

STANDARD OPERATING PROCEDURES (SOP)

FOR

COAST GUARD'S TRAINING SYSTEM

EDUCATION SERVICES OFFICER (ESO)

TRAINING AND ACADEMIA CUSTOMER CARE
TRACKING TOOL (TACCTS)



Force Readiness Command (FC-514)

Coast Guard Institute

September 2009

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U.S. Department of
Homeland Security

United States
Coast Guard



Commandant
United States Coast Guard

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MEMORANDUM

From: Coast Guard Institute

Reply to: NRT
Attn of: Mr. David Perry
(405) 954-4307

To: ESO Community

Subj: COAST GUARD TRAINING SYSTEM STANDARD OPERATING PROCEDURES

1. PURPOSE. This promulgates the Standard Operating Procedures (SOP) for the Training And Correspondence Course Testing System (TACCTS).
2. ACTION. Regional and Full Time ESO's shall ensure compliance with the provisions of this SOP. Internet release is authorized.
3. DISCUSSION. These SOPs identify the approved processes and procedures used for TACCTS. SOPs apply for all CGI activities within TACCTS.
4. CHANGES. Recommendations for improvements/changes to the SOPs shall be submitted to the owner identified in each individual SOP volume. Updates to the SOP will occur as System Change Proposals (SCP) that are approved and implemented.

#

Dist: ESO Community

Copy: None

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TACCTS SOP Change Summary List

Highlighted blue text denotes major changes. Purely editorial changes are not highlighted. Major changes are summarized as follows:

SCP #	Dept. Affected	Date of Implementation	Synopsis
	All	9/9/2009	Comment Box Character Count
70929	All	8/14/2009	Attachments uploaded via TAACTS will now have special characters removed from the file names.
43237	All	8/12/2009	“View All Open Tickets” New page created to list all open tickets across all departments. This link is located on the TACCTS Home Page.
68933	All	8/03/2009	Invalid password attempt lockout . Modified all login pages to use new logic routine to track invalid login attempts. Once an account is at 3 bad logins, the account is locked.
51740	ALL	6/15/2009	Advisory Notes . Created new menu and page options to allow ESO's to add advisory notes on students. This menu option is available when signing into TACCTS
	ALL	Clarification of already implemented procedures	Added note for ESO name drop down menu on search page.

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SECTION 1

INTRODUCTION

TACCTS

Overview

This SOP (Standard Operating Procedures) manual introduces the basic tools and knowledge to assist ESO's in submitting Coast Guard Foundation Education Grant/Vander Putten Education Grant (CGEG/VPEG) applications and solving issues at the CGI (Coast Guard Institute).

All documents pertaining to the TACCTS (Tuition Aid Customer Care Tracking System) are located under the help link in the upper right corner of the screen. This link can be accessed from any screen. Please review all documents in the help section before contacting the CGI with questions.



Help link icon

Purpose

The purpose of this SOP is to identify, establish and publish a clear and standardized set of procedures for navigating through the TACCTS system.

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SECTION 2

TACCTS PROCEDURES ESO

Logging In

Coast Guard Institute Customer Care Tracking System

Please Log In :

User Name :	<input type="text"/>
Password:	<input type="password"/>
<input type="button" value="Login"/>	

PRIVACY ACT OF 1974

A. AUTHORITY FOR USE AND WHETHER MANDATORY OR VOLUNTARY
(1) 14 U.S.C Sec. 633
(2) Voluntary

B. PRINCIPAL PURPOSE - Establish a computer stored record for an inquiry on a Tuition Assistance issue or Non Resident Training issue.

C. ROUTINE PURPOSE
(1) Provide member reference for Tuition Assistance and Non Resident Training problems.
(2) Provide status on member's Tuition Assistance or Non Resident Training request.

D. EFFECT ON INDIVIDUAL IF NOT PROVIDING INFORMATION
Request will not be processed.

[Institutes Home Page : Click Here](#)

- To log on:
 - ESO (Education Service Officer) will receive a “**User Name**” and temporary password from CGI. (Coast Guard Institute) (This will be given to the ESO through an automatic email from TACCTS, once the ESO has submitted a designation letter to CGI) *[For ESO designation procedures and example see Appendix A of this manual]*
- Type in the “**User Name**” in the User Name block (first initial and last name)
- Type in the temporary password in the “**Password**” block (first initial and last name)
- Click “**Login**”

Continued on next page.

Logging In (Continued)

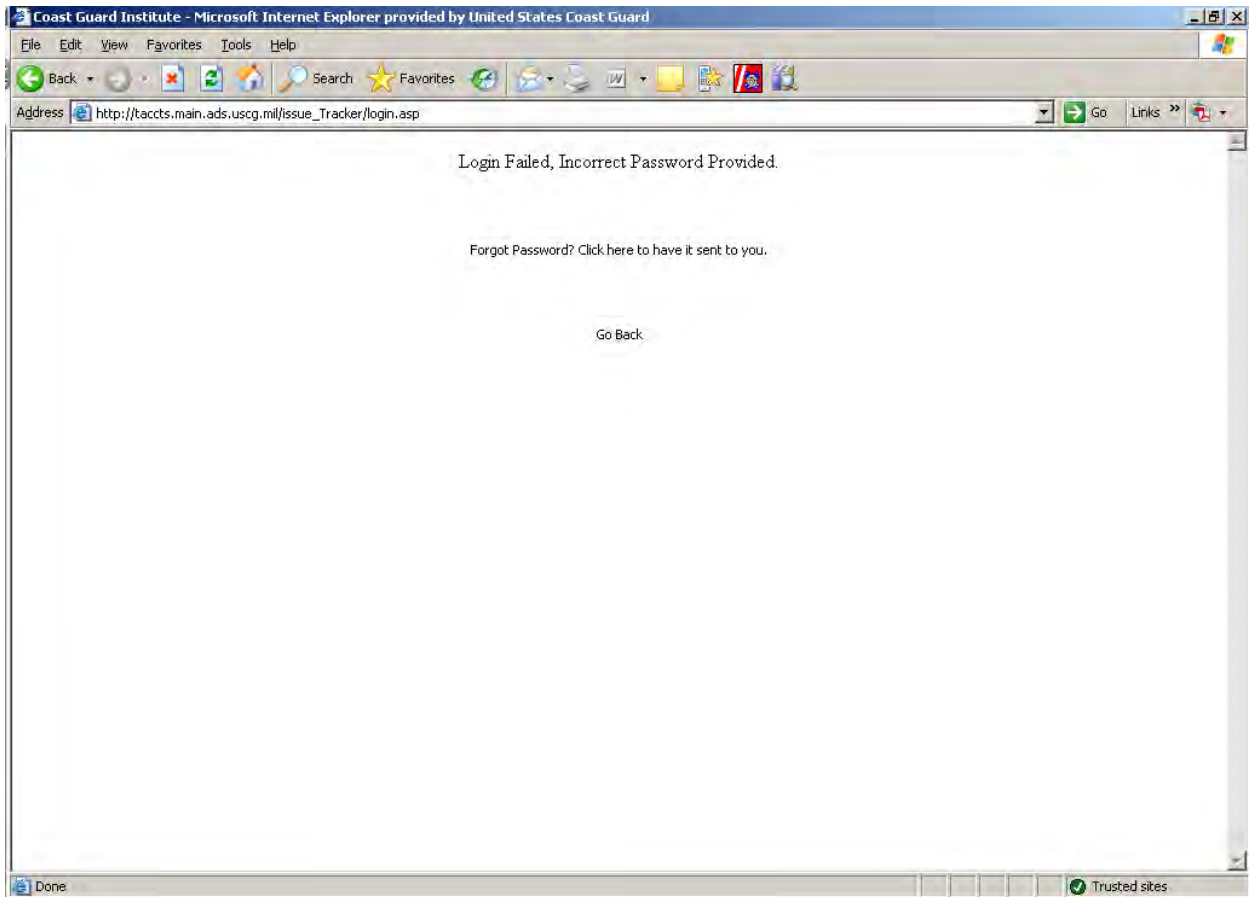
Section 2 TACCTS Procedures

The screenshot shows a web browser window with the address bar displaying http://cgims-instdata3.main.ads.uscg.mil/issue_Tracker/pwdReset.asp?uid=74. The page title is "UNCLASSIFIED" and "provided by United States Coast Guard". The main heading is "Coast Guard Institute Customer Care Tracking System". Below the heading, the text "Please Choose A New Password :" is displayed. The form contains two input fields: "Password :" and "Verify Password:". A "Submit" button is located below the "Verify Password" field. At the bottom of the form, there is a link: "Institutes Home Page : [Click Here](#)". The browser's taskbar at the bottom shows the Start button, several open applications including "http://cgims-ins...", "eso", "TACCTS SOP_ESO...", and "NRT_TACCTS_ESO...", and the system clock showing 1:55 PM.

- To create a new password:
 - Type in the new password
 - Min 8 characters, Max 15.
 - Must contain at least one lowercase and one uppercase letter.
 - Must contain at least one numeric value and one special character.
 - Cannot begin or end with a numeric value.
 - The new password will be case sensitive, so make sure caps lock key is turned off.
 - Type the new password again, exactly the same, in the “**Verify Password**” block
 - Click “**Submit**”

Forgot Password

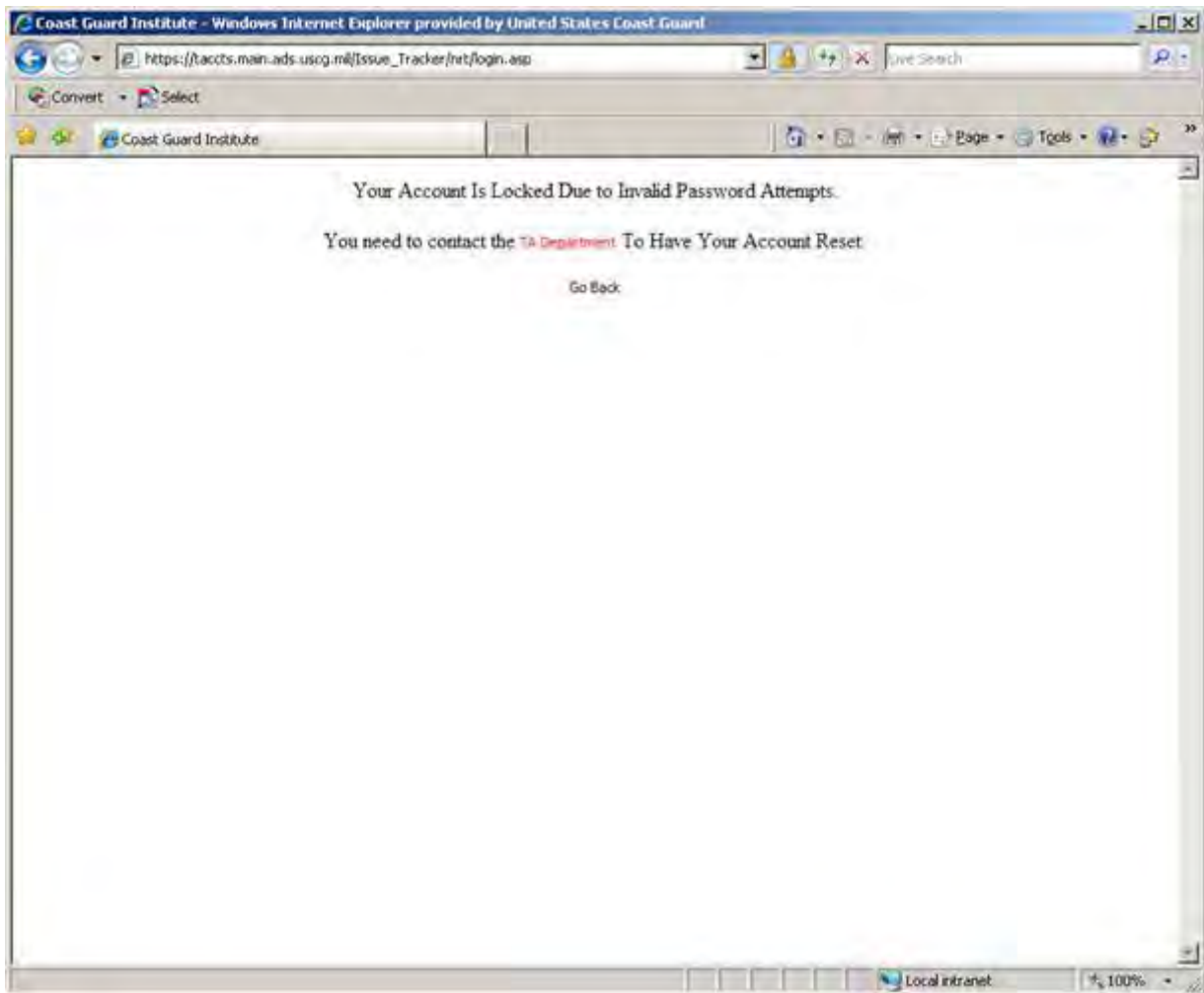
Section 2 TACCTS Procedures



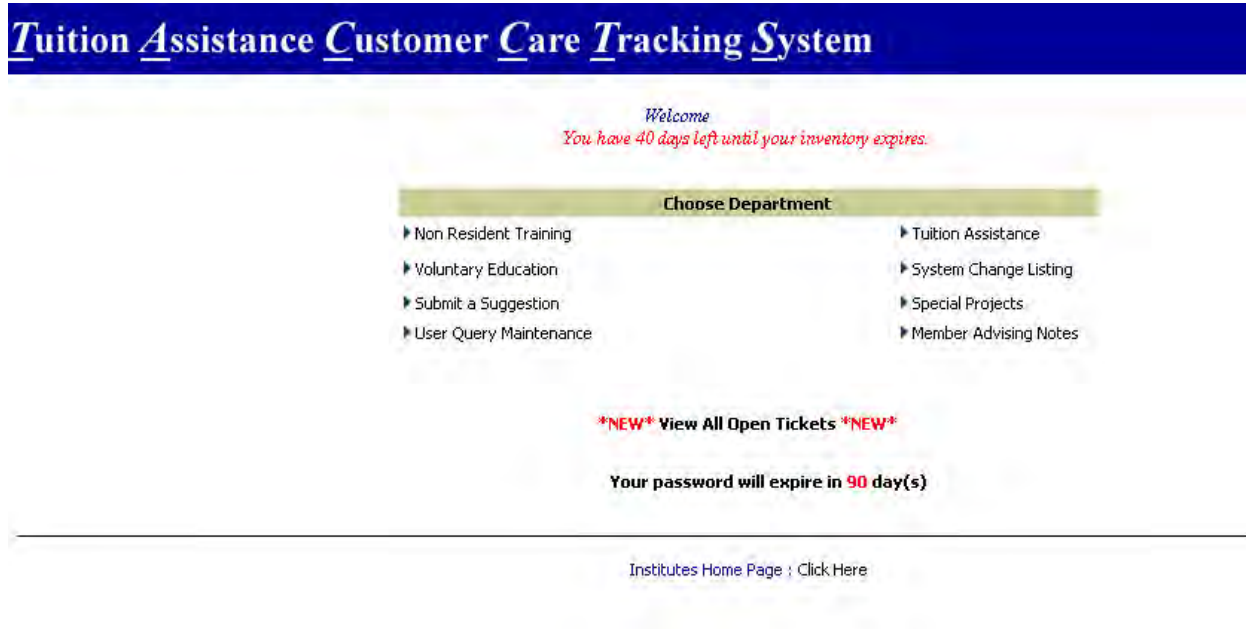
- If you enter the wrong password, this screen will display.
- If you can not remember your password and your account is not locked, then click on **“Forgot Password? Click here to have it sent to you”**, a new temporary password will be emailed to you.
- If you did not forget your password, click on **“Go Back”** and retry log in.
- If your account is locked, you must contact the CGI NRT Dept. to unlock your account.

Invalid Password Attempts Lockout

Section 2 TACCTS Procedures



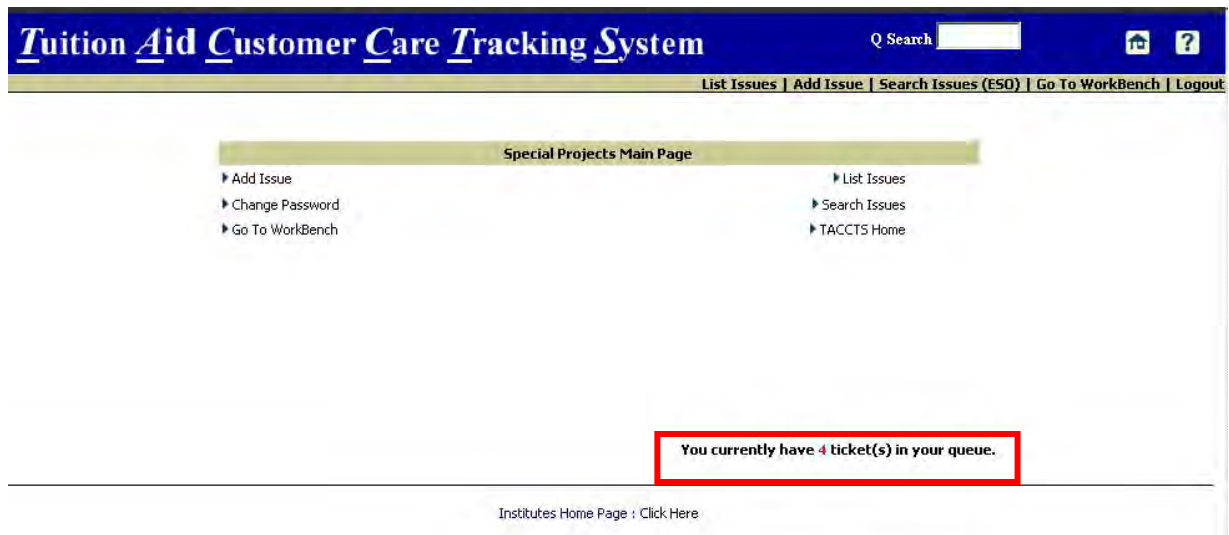
- If you enter the wrong password 3 times, this screen will display.
- You must contact the Tuition Assistance Dept to have your password reset.



- This is the TACCTS Home Page.
- Click on “**Special Projects**” to submit a ticket pertaining to CGEG/VPEG.

Note: The scrolling banner notifies you when your password will expire. (see blue square)
[Passwords expire every 90 days]

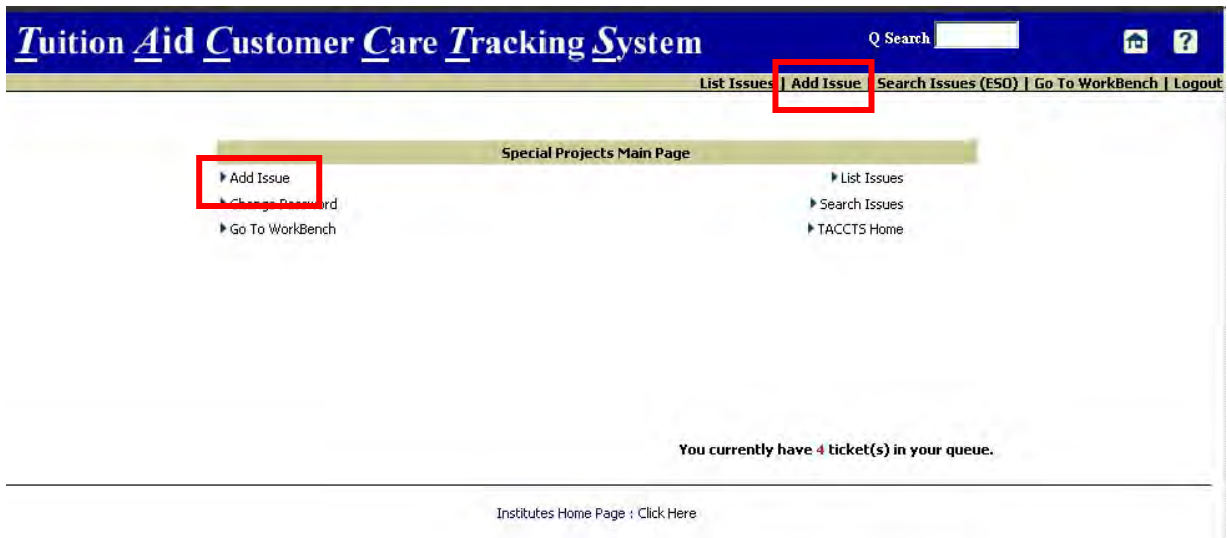
- To view all open tickets for all departments click on “**View All Open Tickets**”.
- To change password from this screen:
 - Click on the **scrolling banner** to navigate the “**Change Password**” screen. (see “Change Password” section of this manual for instructions)



- This is the home page for the TACCTS system, this page list all the options that are needed to navigate through each procedure.
 - **Add Issue-** this option allows the ESO to submit an issue to the CGI SP Dept.
 - **Search Issues-** this option allows the ESO to search through and find a specific members issue ticket, whether it be open, closed or on hold.
 - **Q Search** – a quick search by case id # only.
 - **TACCTS Home-** navigates to the ESO Home page which allows the ESO to be able to switch to a different department
 - **List Issues-** this option list all the current open tickets the ESO has submitted, and allows them to reply to comments sent by the SP Dept.
 - **Go to WorkBench-** this option allows the ESO to save a partially created ticket that is not ready to be submitted.
 - **Change Password-** allows the ESO to change their password at any time.
 - **Department Open ticket queue (scrolling banner)** - this marquee lets the ESO immediately know how many open tickets exist per department.(see red square)

Add Issue

Section 2 TACCTS Procedures



- Click on “**Add Issue**” (either link)

Continued on next page.

Add Issue (Continued)

Section 2 TACCTS Procedures

The screenshot shows the 'Add New Issue' form within the 'Tuition Aid Customer Care Tracking System'. The form has a blue header with the system name and navigation links: 'List Issues', 'Add Issue', 'Search Issues (ESO)', and 'Go To WorkBench'. The form fields are as follows:

- Issue Name:** Text input field.
- Member SSN:** Text input field.
- Description:** Drop-down menu with 'NEW FOUNDATION GRANT REQUEST' selected.
- Comments:** Text area with a red note '(* 1000 Char. Limit *)'.
- Attachments:** Section with 'Attachment 1:' label, a text input field, a 'Browse...' button, and a yellow 'Add a file' button.
- Submitted By:** Drop-down menu with 'JAMIE HUBBLE' selected.
- Assigned To:** Drop-down menu with 'Special Projects' selected.
- Request Date:** Text input field with '11/13/2008' entered.
- Status:** Drop-down menu with 'Open' selected.
- Priority:** Drop-down menu with 'Normal' selected.
- Submit:** Button at the bottom left.

- To add a new issue, fill in each field.
 - **Issue Name-** Type in a brief description of the member's issue.
 - **Member SSN-** Type in the member's Social Security Number, leaving out the hyphens (dashes)
 - **Description-** Click on drop down menu and select the option that best describes the issue.
 - **Comments-** This field is for the details concerning the issue.

(explanation of this screen is continued on next page)

Continued on next page.

Tuition Aid Customer Care Tracking System

List Issues | Add Issue | Search Issues (ESO) | Go To WorkBench

Add New Issue

Issue Name:

Member SSN:

Description: NEW FOUNDATION GRANT REQUEST ▼

Comments:
(* 1000 Char. Limit *)

Attachments: Attachment 1: **Browse...**
Add a file

Submitted By: JAMIE HUBBLE ▼

Assigned To: Special Projects ▼

Request Date: 11/13/2008

Status: Open ▼

Priority: Normal ▼

Submit

- **Attachments-** This option allows the ESO to send an attachment with the issue ticket if needed.
 - To upload attachment:
 - Click on “**Browse**”

Important!

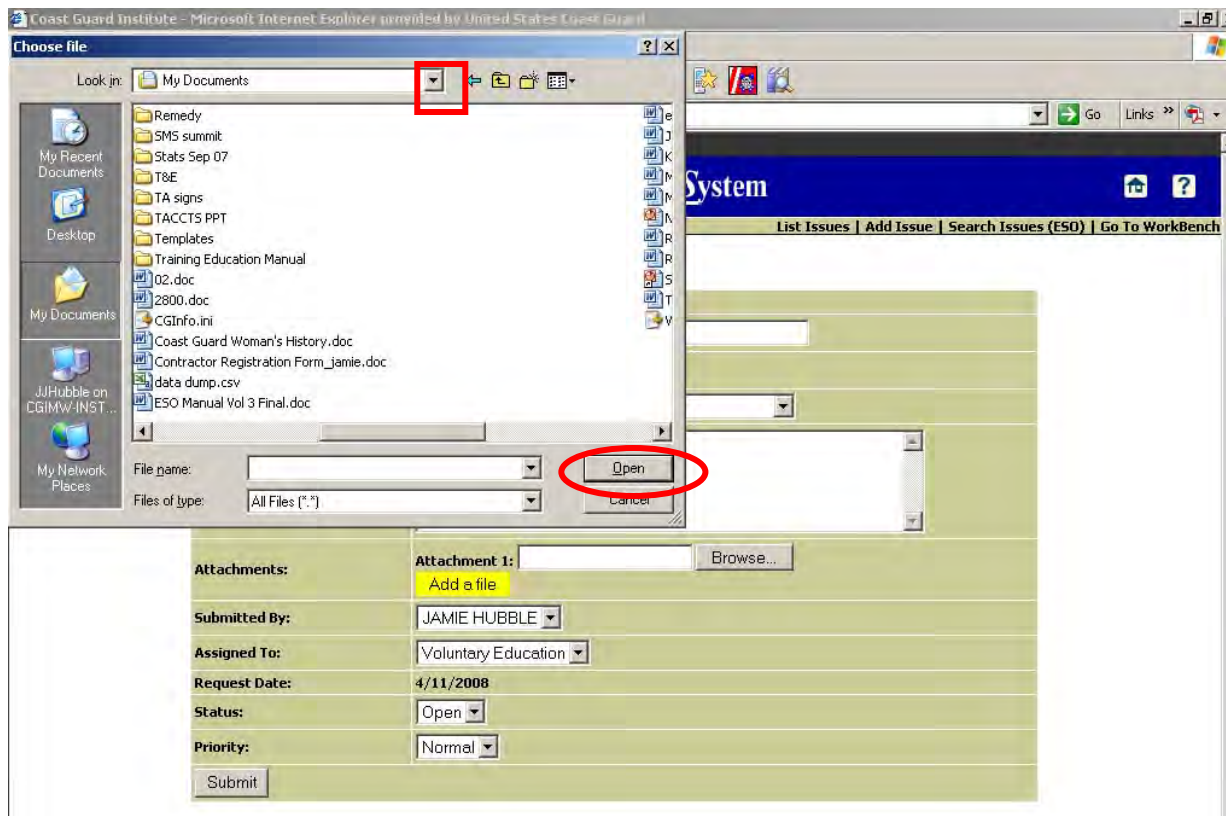
Naming Conventions used for attachments uploaded to TACCTS- All attachments must be named the “members last name_current date”; attachments with the same names will overwrite previous attachments with same names. If there is more than one attachment for that member that day, use “members last name-1_current date”, “members last name-2_current date”, ect... **Attachments** uploaded via TAACTS will now have special characters removed from the file names.

(explanation of this screen is continued on next page)

Continued on next page.

Add Issue (Continued)

Section 2 TACCTS Procedures



- A browse window will appear.
- Use the “**Look in**” block down arrow to find the document to be attached (see red square).
- Click on the document to be attached.
- Click “**Open**”

(explanation of this screen is continued on next page)

Continued on next page.

Add Issue (Continued)

Section 2 TACCTS Procedures

Add New Issue

Issue Name:

Member SSN:

Description: NEW FOUNDATION GRANT REQUEST ▼

Comments:
(* 1000 Char. Limit *)

Attachments: Attachment 1: \\CGIMS-RISAPPS\Use Browse...
Add a file

Submitted By: JAMIE HUBBLE ▼

Assigned To: Special Projects ▼

Request Date: 11/13/2008

Status: Open ▼

Priority: Normal ▼

Submit

- The file will appear in the “**Attachment 1**” block.
- If more than one file needs to be attached:
 - After the first file is attached.
 - Click on “**Add a file**” (highlighted in yellow)

(explanation of this screen is continued on next page)

Continued on next page.

Add Issue (Continued)

Section 2 TACCTS Procedures

Add New Issue

Issue Name:

Member SSN:

Description: NEW FOUNDATION GRANT REQUEST ▼

Comments:
(* 1000 Char. Limit *)

Attachments: Attachment 1: \\CGIMS-RISAPPS\Use Browse...
Attachment 2: Browse...
Add a file

Submitted By: JAMIE HUBBLE ▼

Assigned To: Special Projects ▼

Request Date: 11/13/2008

Status: Open ▼

Priority: Normal ▼

Submit

- This will open an “Attachment 2” block.
- As many attachments needed, can be uploaded. (up to 5mb)
 - Click on “Add a file” (highlighted in yellow) after each attachment is uploaded to add additional attachments.

(explanation of this screen is continued on next page)

Continued on next page.

Add Issue (Continued)

Section 2 TACCTS Procedures

Add New Issue	
Issue Name:	<input type="text"/>
Member SSN:	<input type="text"/>
Description:	NEW FOUNDATION GRANT REQUEST ▾
Comments:	<div>(* 1000 Char. Limit *) <input type="text"/></div>
Attachments:	Attachment 1: \\CGIMS-RISAPPS\Use <input data-bbox="987 766 1101 798" type="button" value="Browse..."/>
	Attachment 2: <input type="text"/> <input data-bbox="987 808 1101 835" type="button" value="Browse..."/>
	<input data-bbox="576 846 706 877" type="button" value="Add a file"/>
Submitted By:	JAMIE HUBBLE ▾
Assigned To:	Special Projects ▾
Request Date:	11/13/2008
Status:	Open ▾
Priority:	Normal ▾
<input data-bbox="267 1123 349 1155" type="button" value="Submit"/>	

- **Submitted By-** This field will automatically default to the current ESO's name (your name).
- **Assigned to-** This field will automatically default to “**Special Projects**”.
- **Request Date-** This field will automatically default to today's date or the date the issue is submitted.
- **Status-** This field will automatically default to “**Open**”. (When a ticket is submitted it will be considered an open ticket until SP Dept. addresses the issue.)
- **Priority-** Click on the drop down menu to select the priority of the issue.
- Click on “**Submit**” to submit the issue to SP Dept.

Continued on next page.

Add Issue (Continued)

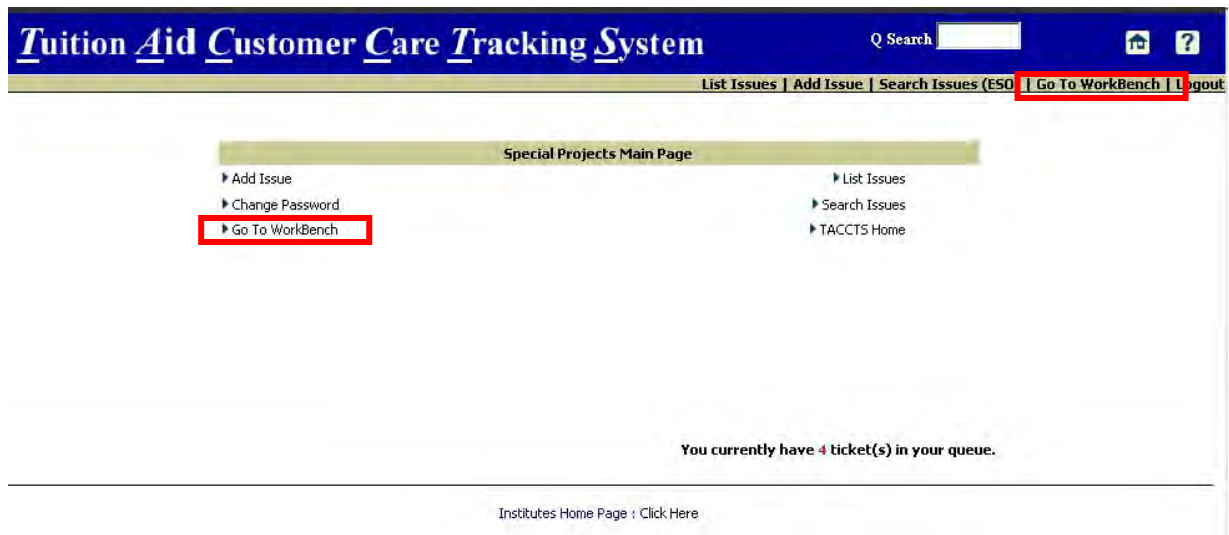
Section 2 TACCTS Procedures

Add Issue (Cont.)

Once an issue has been submitted. The ESO will receive an email indicating the issue was assigned to the institute and the ticket will be listed in the ESO's "**List Issue**" screen. Once the institute receives the email notification, the ticket will be assigned to a technician to work the issue. Anytime there is an update to the ticket, the ESO will receive an email indicating the update. The ESO does not have to log into TACCTS to view the comments on the update. The comments will be included in the email. Sometimes an attachment will need to be sent to the ESO from the SP Dept. The attachment will be located in the email received to notify the ESO the case has been updated. Attachments can also be opened from the ticket itself.

Go to Workbench

Section 2 TACCTS Procedures



- **Go to WorkBench**- this option allows the ESO to save a partially created ticket that is not ready to be submitted.

Note: If an ESO needs to partially create a ticket to submit at a later time, save the ticket to the WorkBench. The TACCTS system will time out for non- activity, so if a ticket is started in the workbench and then left, when the system automatically logs out, the partially created ticket is lost. If the ticket is saved to the Workbench, the ESO can access the Workbench tickets at a later time to add information and then submit the ticket.

- To view or submit tickets from the WorkBench.
 - Click on “**Go to WorkBench**” (either link).

Continued on next page.

Go to Workbench (Continued)

Section 2 TACCTS Procedures

Tuition Aid Customer Care Tracking System

[List Issues](#) | [Add Issue](#) | [Search Issues \(ESO\)](#) | [Go To WorkBench](#)

WorkBench Tickets						
Number:	Name:	Description:	Priority	Assigned to:	Date:	Status:
Add New WorkBench Case						

[Institutes Home Page : Click Here](#)

- Click on “Add New WorkBench Case” (see red arrow on screen print)

Continued on next page.

Go to Workbench (Continued)

Section 2 TACCTS Procedures

Add New Issue To WorkBench	
Issue Name:	<input type="text" value="TEST do not delete please"/>
Member SSN:	<input type="text"/>
Description:	<input type="text" value="NEW FOUNDATION GRANT REQUEST"/>
Comments: (* 1000 Char. Limit *)	<div>This is a test</div>
Submitted By:	<input type="text" value="JAMIE HUBBLE"/>
Assigned To:	<input type="text" value="Special Projects"/>
Request Date:	<input type="text" value="11/13/2008"/>
Status:	<input type="text" value="Open"/>
Priority:	<input type="text" value="Normal"/>
<input type="button" value="Save To WorkBench"/>	

- Fill in desired information.
- Click **“Save to WorkBench”**.

Continued on next page.

Go to Workbench (Continued)

Section 2 TACCTS Procedures

The screenshot displays the 'Tuition Aid Customer Care Tracking System' interface. At the top, there is a blue header bar with the system name and two icons (a home icon and a question mark icon). Below the header, a navigation bar contains links: 'List Issues', 'Add Issue', 'Search Issues (ESO)', and 'Go To WorkBench'. The main content area is titled 'WorkBench Tickets' and contains a table with the following data:

Number:	Name:	Description:	Priority	Assigned to:	Date:	Status:
162		NEW FOUNDATION GRANT REQUEST	Normal	Special Projects	11/13/2008 1:15:58 PM	Open

Below the table, there is a link 'Add New WorkBench Case'. At the bottom of the page, there is a link 'Institutes Home Page : Click Here'.

- Once the ticket is saved to the “**Workbench**”
- It will be listed in the “**WorkBench Tickets**” screen.
- Click anywhere on the row of the ticket to view the details of the ticket or to add information to ticket.

Continued on next page.

Go to Workbench (Continued)

Section 2 TACCTS Procedures

Modify WorkBench Issue	
Issue Number:	162
Issue Name:	<input type="text"/>
Member SSN:	<input type="text"/>
Description:	NEW FOUNDATION GRANT REQUEST ▾
Submitted By:	JAMIE HUBBLE ▾
Assigned To:	Special Projects ▾
Submit Date :	11/13/2008 1:17:35 PM
Status:	Open ▾
Priority:	Normal ▾
Comments:	<div><div></div></div>
Attachments: *Attachments Are Not Saved. Only Attach Documents When Ready To Submit Ticket.	Attachment 1: <input type="text"/> Browse... Add a file
<input type="button" value="Save"/> <input type="button" value="Delete"/>	
<input type="button" value="Submit Ticket"/>	

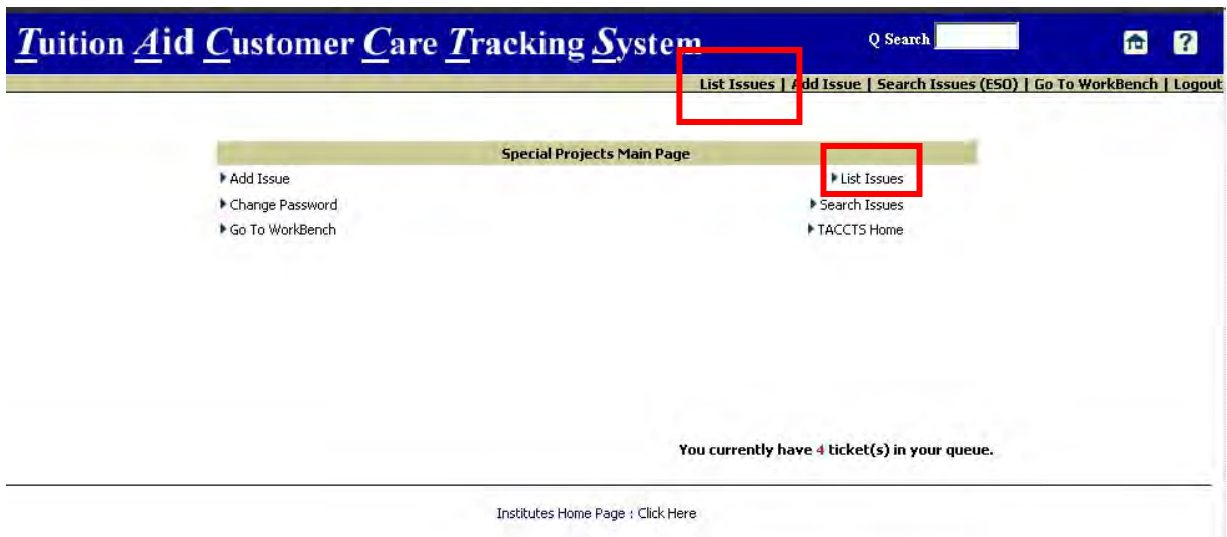
- Fill in the desired fields. (Finish creating the ticket)
- Click **“Submit Ticket”**.
- If ticket still isn't ready to be submitted:
 - Click on **“Save”**.
 - Click on **“Delete”** to delete the ticket completely.

Note: A WorkBench ticket that is submitted will no longer show up in the **“WorkBench list”**. It will now be located in the **“List Issues”** screen.

Continued on next page.

List Issues

Section 2 TACCTS Procedures



- To view the ESO's tickets submitted to the VE Dept:
 - Click on “**List Issues**”.

Continued on next page.

List Issues (Continued)

Section 2 TACCTS Procedures

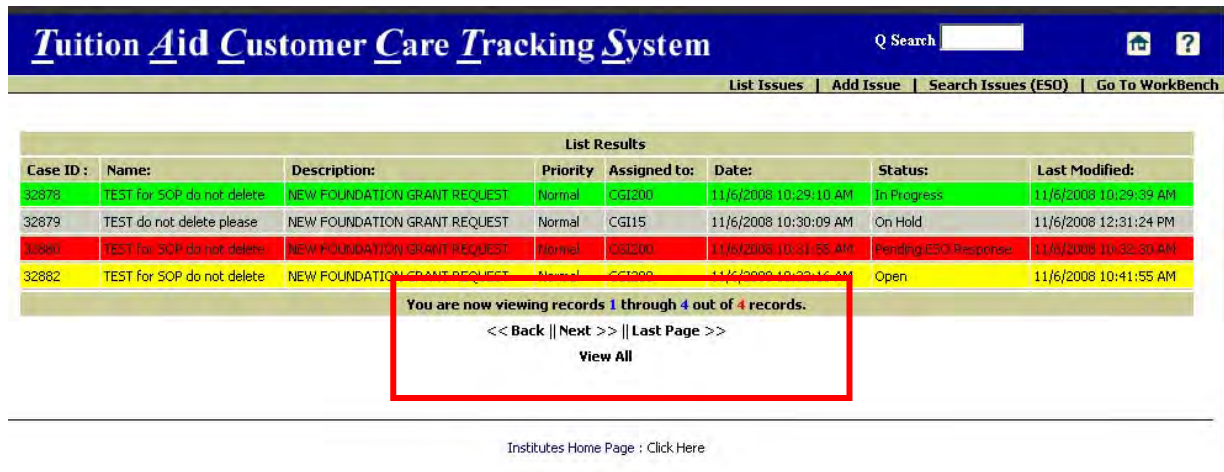
The screenshot shows the 'Tuition Aid Customer Care Tracking System' interface. At the top, there is a blue header with the system name and a search bar. Below the header, there is a navigation bar with links: 'List Issues', 'Add Issue', 'Search Issues (ESO)', and 'Go To WorkBench'. The main content area is titled 'List Results' and contains a table with columns: 'Case ID:', 'Name:', 'Description:', 'Priority', 'Assigned to:', 'Date:', 'Status:', and 'Last Modified:'. Below the table, it says 'No Open Tickets. Click Here to View All'. A message states 'You are now viewing records through out of 0 records.' and there are navigation links: '<< Back || Next >> || Last Page >>' and a 'View All' link.

- If the “**List Issue**” screen appears like this example.
- This means the ESO has no open tickets.
- Click on “**Click here to view all**” to display all of the closed tickets for that ESO without having to perform a “**Search**”.

Continued on next page.

List Issues (Continued)

Section 2 TACCTS Procedures



The screenshot shows the 'Tuition Aid Customer Care Tracking System' interface. At the top, there is a search bar and navigation links: 'List Issues', 'Add Issue', 'Search Issues (ESO)', and 'Go To WorkBench'. Below this is a table titled 'List Results' with columns: Case ID, Name, Description, Priority, Assigned to, Date, Status, and Last Modified. The table contains four rows of data, each with a different background color corresponding to its status: Green for 'In Progress', Gray for 'On Hold', Red for 'Pending ESO Response', and Yellow for 'Open'. A red box highlights the pagination controls at the bottom of the table, which include the text 'You are now viewing records 1 through 4 out of 4 records.', '<< Back || Next >> || Last Page >>', and a 'View All' link. Below the table, there is a link that says 'Institutes Home Page : Click Here'.

Case ID :	Name:	Description:	Priority	Assigned to:	Date:	Status:	Last Modified:
32676	TEST for SOP do not delete	NEW FOUNDATION GRANT REQUEST	Normal	CGI200	11/6/2008 10:29:10 AM	In Progress	11/6/2008 10:29:39 AM
32679	TEST do not delete please	NEW FOUNDATION GRANT REQUEST	Normal	CGI15	11/6/2008 10:30:09 AM	On Hold	11/6/2008 12:31:24 PM
32681	TEST for SOP do not delete	NEW FOUNDATION GRANT REQUEST	Normal	CGI200	11/6/2008 10:31:55 AM	Pending ESO Response	11/6/2008 10:32:50 AM
32682	TEST for SOP do not delete	NEW FOUNDATION GRANT REQUEST	Normal	CGI200	11/6/2008 10:33:16 AM	Open	11/6/2008 10:41:55 AM

You are now viewing records 1 through 4 out of 4 records.
<< Back || Next >> || Last Page >>
View All

Institutes Home Page : Click Here

- If the “**List Issue**” screen appears like this example, the ESO has open tickets.
- To view the details of the ticket, click anywhere on the row of the ticket.
- To view tickets that have already been closed or on hold from this view, click on “**Search Issue**” (in the upper right hand corner of the screen).
- To navigate from page to page, click on “**Back, Next or Last Page**” (see red square)



Note: the color coding is due to the status the ticket is currently in.

- Yellow – open
- Green – in progress
- Red – pending ESO response
- Gray – on hold
- Blue - closed

Continued on next page.

List Issues (Continued)

Section 2 TACCTS Procedures

Tuition Aid Customer Care Tracking System Q Search  

[List Issues](#) | [Add Issue](#) | [Search Issues \(ESO\)](#) | [Go To WorkBench](#)

To request a status update, click on the Assigned to Section.

Case ID :	32882
Issue Name:	TEST for SOP do not delete
Member SSN:	
Member Name:	JONATHAN TOY
Description:	NEW FOUNDATION GRANT REQUEST
Submitted by:	JAMIE HUBBLE
Assigned to:	Special Projects
Tech Assigned:	CGI200
Request Date:	11/6/2008 10:33:16 AM
Status:	Open
Priority:	Normal
Date Resolved:	
Resolution:	
Previous Attachments:	no attachments

[Add Comment](#) | [Print Issue](#)

Comments:	Date:	Comment By:
edrf	11/6/2008 10:41:55 AM	CGI200
sdfd	11/6/2008 10:33:17 AM	JAMIE HUBBLE
Ticket Creation	11/6/2008 10:33:16 AM	System

- This screen shows the details of the member's ticket. Be sure to pay special attention to the comments section. This section informs the ESO the steps that have been taken from the SP Dept. in resolving the issue, and all activity for the selected issue since the ticket was created. To reply to a comment from SP:
 - Click on **"Add Comment"** (See next page for more steps to add a comment)
 - To request a status up date:
 - Clicking on the **"Assigned to:"** field will automatically open an email addressed to the SP Dept. (See red box on screen print)
- To print this page:
 - Click on **"Print Issue"**.
 - A print dialog box will appear, select the printer and click on **"Print"**.
 - This will print the entire screen including all ticket comments.

Modify Issue [Add Comment]

Section 2 TACCTS Procedures

Modify Issue

Case ID : 59680

Issue Name: Did not receive YN1 test

Member SSN:

Member Name:

Description: NEW TA APPLICATION

Submitted By:

Assigned To: Tuition Assistance

Technician Assigned: ☐ Internal Tech Transfer

Transfer to Dept:

Submit Date : 5/27/2009 1:31:21 PM


Status:

Priority: Normal

Comments:

Send Comments To Member: ☐

Attachments: Attachment 1: Browse...
Add a file

Previous Attachments: 

Update

Comments: Date: Comment By:

- Click in the “**Comments**” field.
- Type necessary comments. (The right hand corner of the comment box displays how many characters you have left that can be typed in the box, each comment box allows 1000 characters)

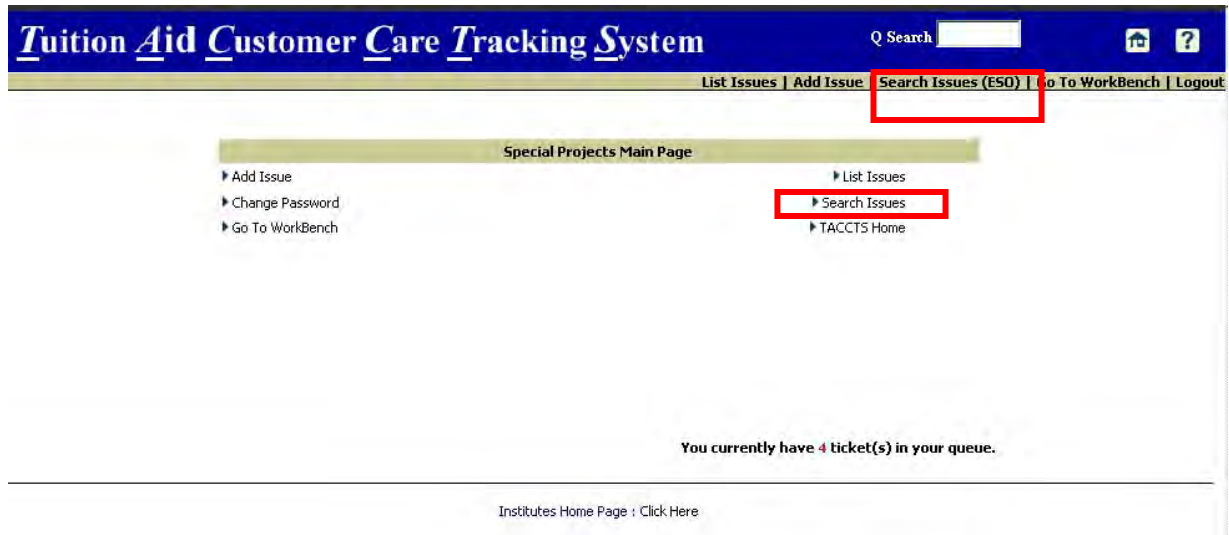
Note 1: The comments history can be viewed at the bottom of the screen.

Note 2: If necessary the ESO can modify the “Issue Name”, “Member Identifier”, “Member Name” and “Priority Level” fields.

- Click on “**Update**”.
 - This will automatically generate an email to the NRT Dept. informing them of the comments added to the issue.
- Attachments can be uploaded and sent with the comments to the NRT dept.
- TACCTS saves all attachments that are sent. Previous attachments can be viewed by clicking on the attachment icon, in the “**Previous Attachments**” section above. (see red square)

Search Issues

Section 2 TACCTS Procedures



- To find a particular ticket whether it be “open”, “closed” or “on hold”.
 - Click on “**Search Issues**” (either link).

Continued on next page.

Search Issues (Continued)

Section 2 TACCTS Procedures

Search for Issues:

Submitted By:	=	JAMIE HUBBLE	
Case ID:	=		
Assigned To:	=		
Member Name:	=		
Member Identifier:	=		
Comments:	Contains		
Priority:	=		
Status:	=		
Problem Type:	=		
Resolution Code:	=		
Ticket Creation Date Range:			
Starting Date:			
Ending Date:			
Ticket Resolved Date Range:			
Starting Date:			
Ending Date:			
<input type="button" value="Search"/>			

- Type in as much information known about the ticket as possible. If there is more than one ticket with similar information, all of those tickets will show up in the search results. The more information known about the particular ticket in question, the better. “Search Issues” allows the ESO to search through open, closed, or on hold tickets.
- If there is more than one ESO’s at a unit, click on the down arrow (Submitted by) to search for tickets submitted by other ESO’s at the same unit. (see red circle)
- The drop down menu next to each component allows for a more robust searching capability. (see red square)
 - = (equal too)
 - ≠ (not equal too)
 - Like
- After typing in the desired information.
 - Click on “**Search**”

Note: The ESO’s name will not appear in the drop down menu if there aren’t any tickets in the system for that ESO.

Continued on next page.

Search Issues (Continued)

Section 2 TACCTS Procedures

Search for Issues:

Saved Search:		<input type="text"/>
Submitted By:	= <input type="text"/>	<input type="text"/>
Case ID:	= <input type="text"/>	<input type="text"/>
Assigned To:	= <input type="text"/>	<input type="text"/>
Member Name:	= <input type="text"/>	<input type="text"/>
Member Identifier:	= <input type="text"/>	<input type="text"/>
Comments:	Contains <input type="text"/>	<input type="text"/>
Priority:	= <input type="text"/>	<input type="text"/>
Status:	= <input type="text"/>	<input type="text"/>
Problem Type:	= <input type="text"/>	<input type="text"/>
Resolution Code:	= <input type="text"/>	<input type="text"/>
Ticket Creation Date Range:		
Starting Date:		<input type="text"/>
Ending Date:		<input type="text"/>
Ticket Resolved Date Range:		
Starting Date:		<input type="text"/>
Ending		<input type="text"/>

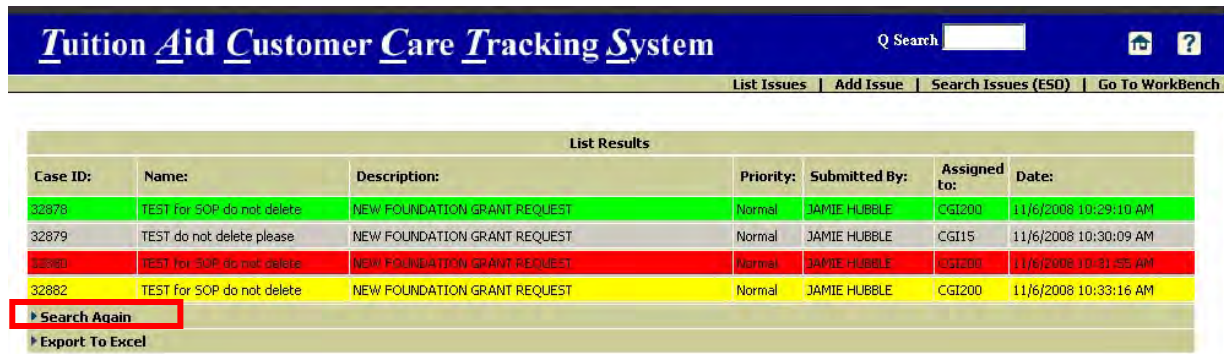
- The drop down menu next to each component allows for a more robust searching capability. (see red square)
 - = (equal too)
 - ≠ (not equal too)
 - Like
- After typing in the desired information.
 - Click on “**Search**”

Note: ESO's can now use the search page to search any ticket in the system. This is still done by dept. and the ESO's name will still be the default on the search listing, but they can now change it.

Continued on next page.

Search Issues (Continued)

Section 2 TACCTS Procedures



The screenshot shows the 'Tuition Aid Customer Care Tracking System' interface. At the top, there is a search bar with a magnifying glass icon and a question mark icon. Below the search bar, there are navigation links: 'List Issues', 'Add Issue', 'Search Issues (ESO)', and 'Go To WorkBench'. The main content area is titled 'List Results' and contains a table with the following data:

Case ID:	Name:	Description:	Priority:	Submitted By:	Assigned to:	Date:
32878	TEST for SOP do not delete	NEW FOUNDATION GRANT REQUEST	Normal	JAMIE HUBBLE	CGI200	11/6/2008 10:29:10 AM
32879	TEST do not delete please	NEW FOUNDATION GRANT REQUEST	Normal	JAMIE HUBBLE	CGI15	11/6/2008 10:30:09 AM
32880	TEST for SOP do not delete	NEW FOUNDATION GRANT REQUEST	Normal	JAMIE HUBBLE	CGI200	11/6/2008 10:31:55 AM
32882	TEST for SOP do not delete	NEW FOUNDATION GRANT REQUEST	Normal	JAMIE HUBBLE	CGI200	11/6/2008 10:33:16 AM

Below the table, there are two buttons: 'Search Again' and 'Export To Excel'. The 'Search Again' button is highlighted with a red border.

- Search results:
 - Click anywhere on the row of the ticket to view the details of the ticket.
 - If the search results did not generate the desired ticket or if another ticket is desired.
 - Click on “**Search Again**” (in the bottom left corner of the screen). This will return to the “Search for Issues” screen.

Note: the color coding is due to the status the ticket is currently in.

- Yellow – open
- Green – in progress
- Red – pending ESO response
- Gray – on hold
- Blue – closed

Continued on next page.

Save Ticket Search

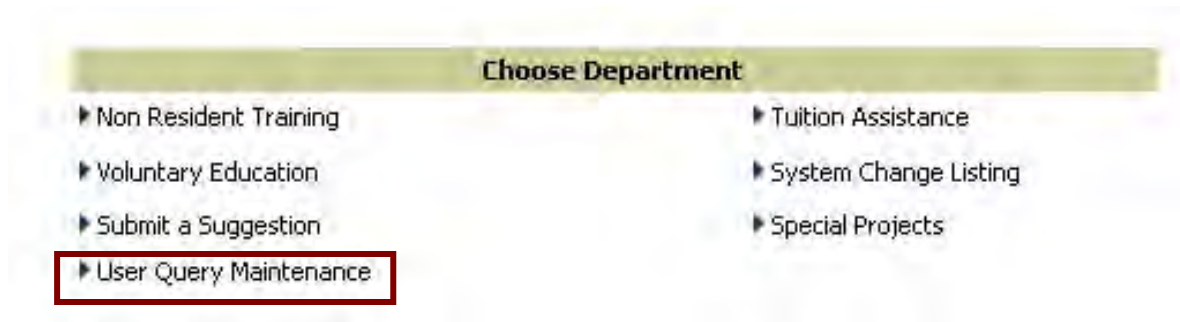
Search Name:

- Type the name of the saved search in the “**Search Name**” field.
- Click on “**Save**”.

Search for Issues:

Saved Search:		<input type="text"/>
Submitted By:	<input type="button" value="="/>	<input type="text" value="NAME OF SEARCH"/>
Case ID:	<input type="button" value="="/>	<input type="text"/>
Assigned To:	<input type="button" value="="/>	<input type="text"/>
Member Name:	<input type="button" value="="/>	<input type="text"/>
Member Identifier:	<input type="button" value="="/>	<input type="text"/>
Comments:	<input type="button" value="Contains"/>	<input type="text"/>
Priority:	<input type="button" value="="/>	<input type="text"/>

- The saved search will now display in the “**Saved Search**” drop down menu on the “**Search for Issues**” screen.



- The ESO can manage their saved searches by clicking on the “**User Query Maintenance**” on the “**TACCTS Home**” page.



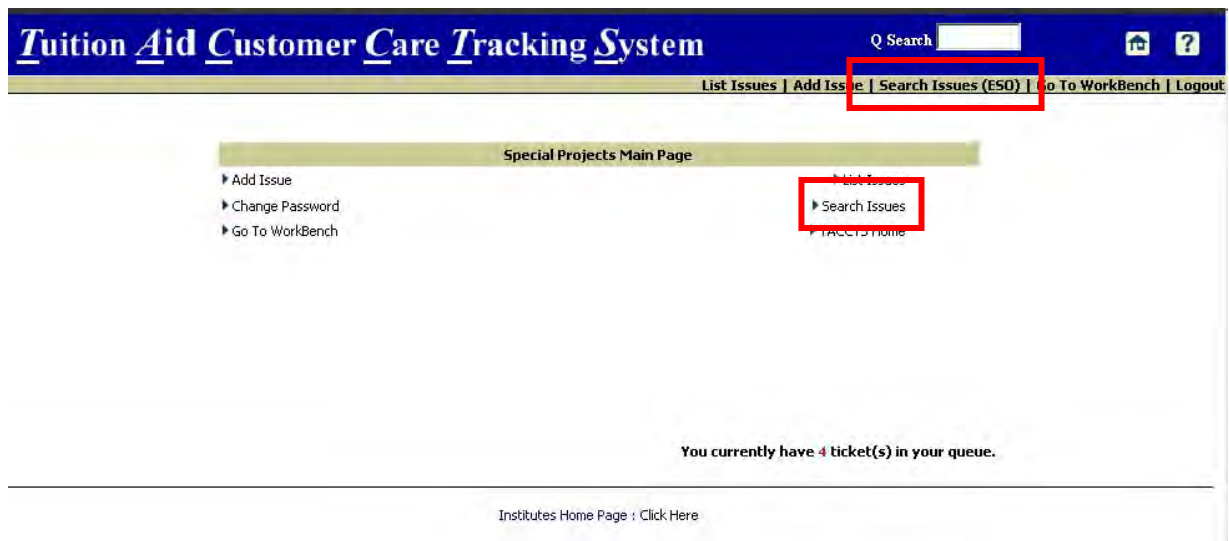
- Each saved search is department oriented. (ie.. if an ESO sets up a saved search for Non-Resident Training, the same saved search will not be available for Tuition Assistance, it will need to be set up in both departments. The page will display all saved searches for each department.
- Click on “**delete**” to delete a saved search.

Excel Spreadsheet

Section 2 TACCTS Procedures

Procedure Instructions

The CGI has made an Excel spreadsheet available to keep track of tickets. Follow the screen prints step-by-step to download Excel spreadsheet to PC. It is recommended that this task be completed once a month for a traceable means of the tickets sent to the SP Dept.



- Click on “**Search Issues**” (either link).

Continued on next page.

Excel Spreadsheet (Continued)

Section 2 TACCTS Procedures

Search for Issues:

Submitted By:	=	JAMIE HUBBLE
Case ID:	=	
Assigned To:	=	
Member Name:	=	
Member Identifier:	=	
Comments:	Contains	
Priority:	=	
Status:	=	
Problem Type:	=	
Resolution Code:	=	
Ticket Creation Date Range:		
Starting Date:		
Ending Date:		
Ticket Resolved Date Range:		
Starting Date:		
Ending Date:		
<input type="button" value="Search"/>		

- The spreadsheet will be generated based on the search criteria provided.
 - Fill in the desired criteria.
 - Click on “**Search**” button.

Note: The Excel spreadsheet will generate a report for any tickets returned by the search results. Examples: Spreadsheet for all open tickets, all closed tickets, all tickets for one member, ect....



Continued on next page.

Excel Spreadsheet (Continued)

Section 2 TACCTS Procedures

Tuition Aid Customer Care Tracking System

Q Search



List Issues | Add Issue | Search Issues (ESD) | Go To WorkBench

List Results

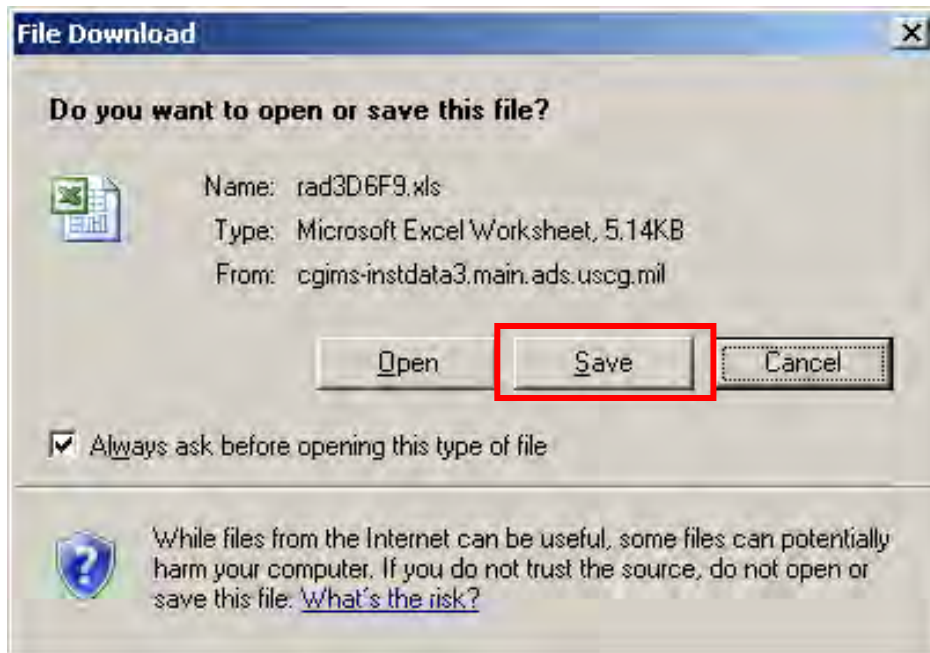
Case ID:	Name:	Description:	Priority:	Submitted By:	Assigned to:	Date:
32878	TEST for SOP do not delete	NEW FOUNDATION GRANT REQUEST	Normal	JAMIE HUBBLE	CGI200	11/6/2008 10:29:10 AM
32879	TEST do not delete please	NEW FOUNDATION GRANT REQUEST	Normal	JAMIE HUBBLE	CGI15	11/6/2008 10:30:09 AM
32880	TEST for SOP do not delete	NEW FOUNDATION GRANT REQUEST	Normal	JAMIE HUBBLE	CGI200	11/6/2008 10:31:55 AM
32882	TEST for SOP do not delete	NEW FOUNDATION GRANT REQUEST	Normal	JAMIE HUBBLE	CGI200	11/6/2008 10:33:16 AM

▶ Search Again

▶ Export To Excel

- Click on “**Export to Excel**”

Continued on next page.

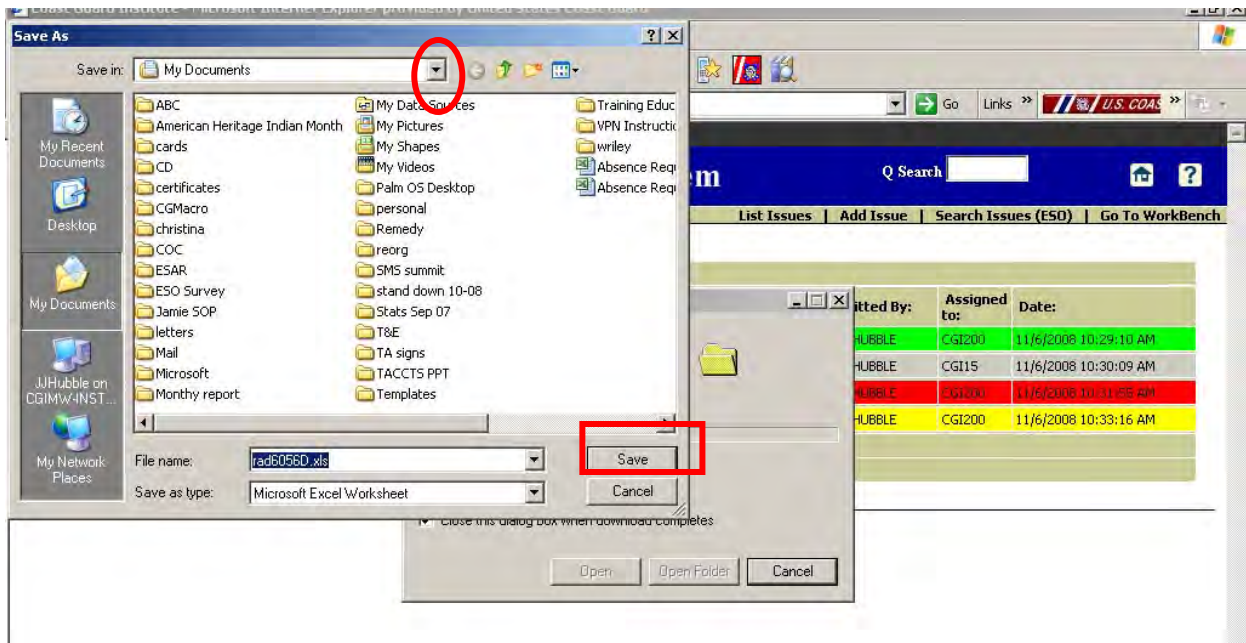


- Click on **“Save”**.

Continued on next page.

Excel Spreadsheet (Continued)

Section 2 TACCTS Procedures

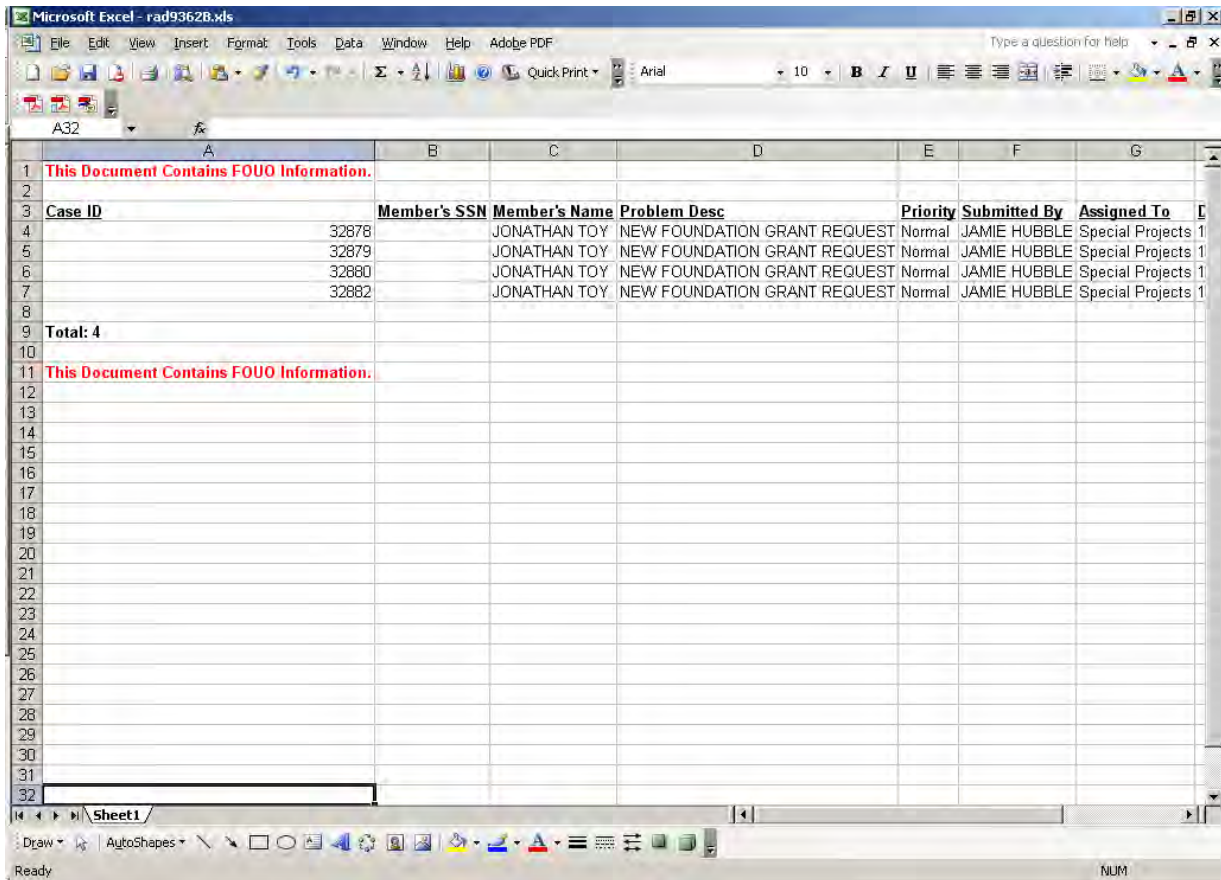


- A browse window will appear.
- Use the “**Save In**” block down arrow to select the desired place the document will be saved.
- Click on “**Save**” on the browse window.

Continued on next page.

Excel Spreadsheet (Continued)

Section 2 TACCTS Procedures



The screenshot shows a Microsoft Excel spreadsheet titled "Microsoft Excel - rad9362B.xls". The spreadsheet contains a table with the following data:

Case ID	Member's SSN	Member's Name	Problem Desc	Priority	Submitted By	Assigned To
32878		JONATHAN TOY	NEW FOUNDATION GRANT REQUEST	Normal	JAMIE HUBBLE	Special Projects 1
32879		JONATHAN TOY	NEW FOUNDATION GRANT REQUEST	Normal	JAMIE HUBBLE	Special Projects 1
32880		JONATHAN TOY	NEW FOUNDATION GRANT REQUEST	Normal	JAMIE HUBBLE	Special Projects 1
32882		JONATHAN TOY	NEW FOUNDATION GRANT REQUEST	Normal	JAMIE HUBBLE	Special Projects 1
Total: 4						

The spreadsheet also includes red text warnings: "This Document Contains FOUO Information." in cells A1 and A11. The status bar at the bottom indicates "Ready" and "NUM".

- To view the Excel spreadsheet
 - Go to where the spreadsheet was saved.
 - Double click to open.
- This is an example of the Excel spreadsheet.

Quick Search

Section 2 TACCTS Procedures

Tuition Aid Customer Care Tracking System Q Search

[List Issues](#) | [Add Issue](#) | [Search Issues \(ESO\)](#) | [Go To WorkBench](#) | [Logout](#)

Special Projects Main Page

- ▶ Add Issue
- ▶ Change Password
- ▶ Go To WorkBench
- ▶ List Issues
- ▶ Search Issues
- ▶ TACCTS Home

You currently have 4 ticket(s) in your queue.

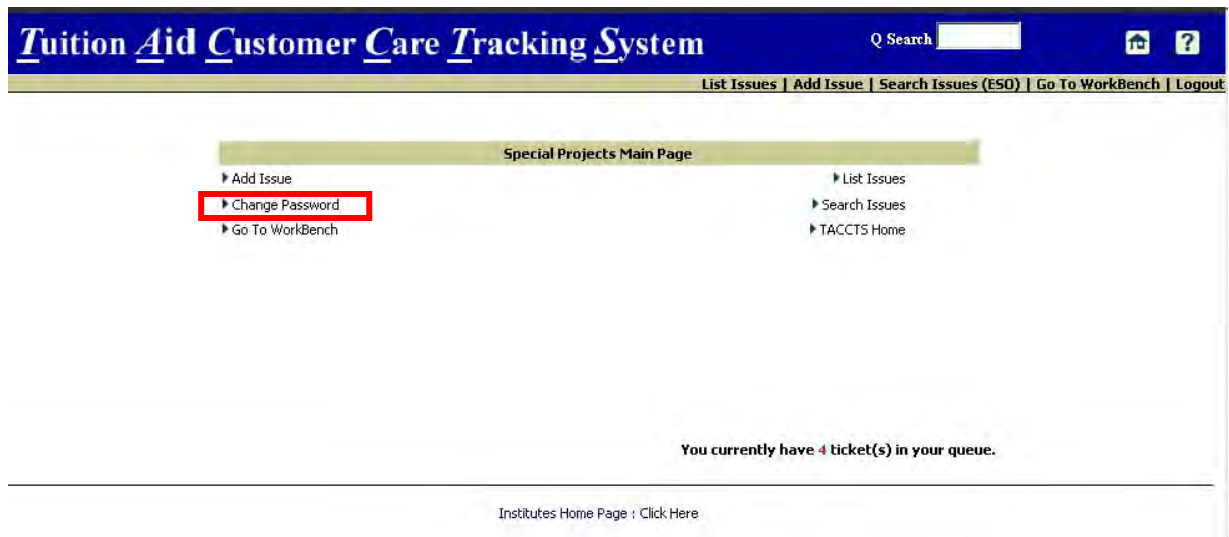
[Institutes Home Page : Click Here](#)

- Click in the “**Q Search**” text box.
- Type in the case ID number.
- Press “**Enter**” on keyboard.
- The ticket will display.

Note: This quick search is by case ID only!

Change Password

Section 2 TACCTS Procedures



- The ESO can change their TACCTS password at any time if needed.
- Click on “**Change Password**”

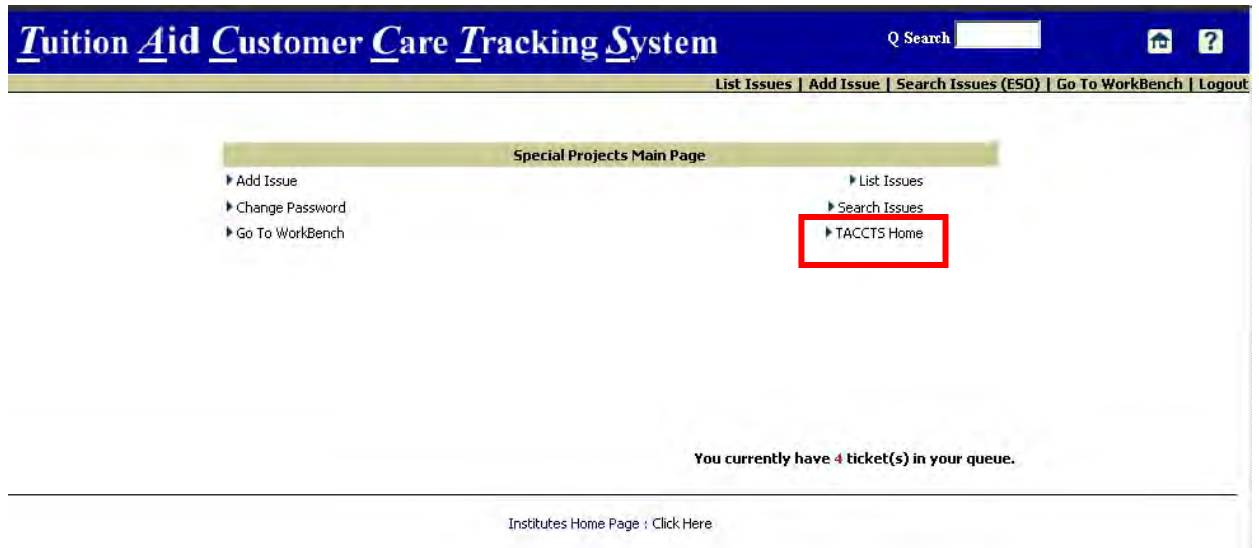
Continued on next page.

Change Password (Continued)

Section 2 TACCTS Procedures

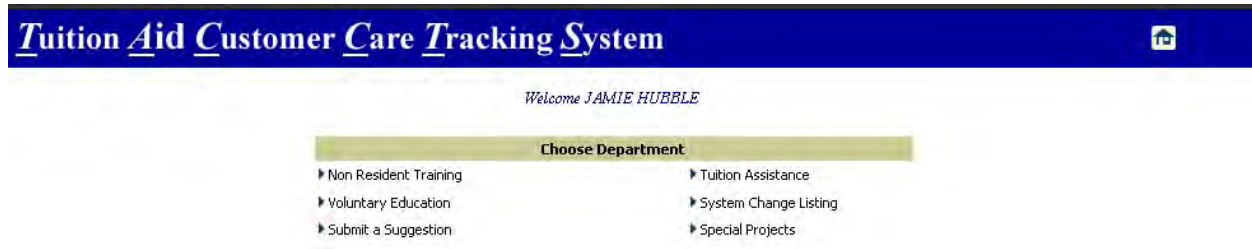
The screenshot shows a web browser window with the address bar displaying http://cgims-instdata3.main.ads.uscg.mil/issue_Tracker/pwdReset.asp?uid=74. The page title is "Coast Guard Institute Customer Care Tracking System". The main content area has a blue header with the system name and a home icon. Below the header, the text "Please Choose A New Password :" is displayed. There is a form with two input fields: "Password :" and "Verify Password:". Below these fields is a "Submit" button. At the bottom of the form, there is a link: "Institutes Home Page : [Click Here](#)". The browser's taskbar at the bottom shows several open applications, including "Inbox - Micro...", "TACCTS Ca...", "eso", "TACCTS SO...", "NRT_TAC...", and "http://cgi...". The system clock in the bottom right corner shows "2:46 PM".

- To create a new password:
 - Type in the new password
 - Min 8 characters, Max 15.
 - Must contain at least one lowercase and one uppercase letter.
 - Must contain at least one numeric value and one special character.
 - Cannot begin or end with a numeric value.
 - The new password will be case sensitive, so make sure caps lock key is turned off.
 - Type the new password again, exactly the same, in the “**Verify Password**” block
 - Click “**Submit**”



- The ESO can switch between departments at any time.
- Click on “**TACCTS Home**”

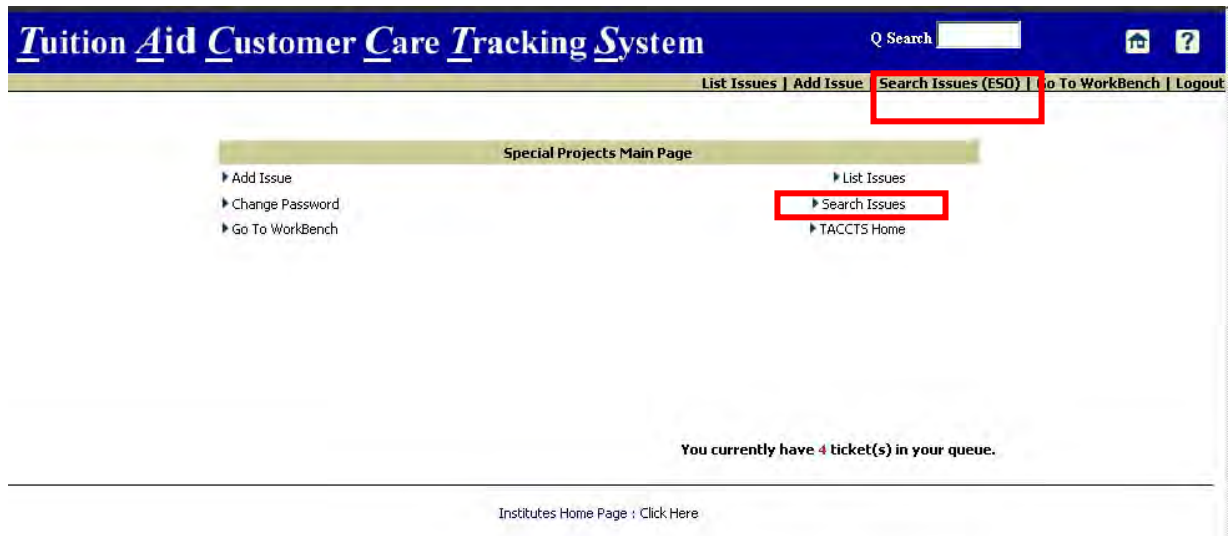
Continued on next page.



- It will navigate to the “TACCTS Home Page” to choose another department.
-

Reopen A TACCTS ticket

Section 2 TACCTS Procedures



Note: For all future issues regarding a specific issue (ticket) please reopen the original ticket vice opening subsequent tickets.

- Click on “**Search Issues**” (either link)

Continued on next page.

Reopen A TACCTS ticket (Continued)

Section 2 TACCTS Procedures

Search for Issues:

Submitted By:	=	JAMIE HUBBLE
Case ID:	=	
Assigned To:	=	
Member Name:	=	
Member Identifier:	=	
Comments:	Contains	
Priority:	=	
Status:	=	
Problem Type:	=	
Resolution Code:	=	
Ticket Creation Date Range:		
Starting Date:		
Ending Date:		
Ticket Resolved Date Range:		
Starting Date:		
Ending Date:		
<input type="button" value="Search"/>		

- Type in as much information known about the ticket as possible. If there is more than one ticket with similar information, all of those tickets will show up in the search results. The more information known about the particular ticket in question, the better.
- Select “**Closed**” in the Status field.
- Click on “**Search**”
- This will also allow the ESO to view all closed tickets.



Continued on next page.

Reopen A TACCTS ticket (Continued)

Section 2 TACCTS Procedures

Tuition Aid Customer Care Tracking System

Q Search



List Issues | Add Issue | Search Issues (ESO) | Go To WorkBench

List Results						
Case ID:	Name:	Description:	Priority:	Submitted By:	Assigned to:	Date:
32878	TEST for SOP do not delete	NEW FOUNDATION GRANT REQUEST	Normal	JAMIE HUBBLE	CGI200	11/6/2008 10:29:10 AM
32879	TEST do not delete please	NEW FOUNDATION GRANT REQUEST	Normal	JAMIE HUBBLE	CGI15	11/6/2008 10:30:09 AM
32880	TEST for SOP do not delete	NEW FOUNDATION GRANT REQUEST	Normal	JAMIE HUBBLE	CGI200	11/6/2008 10:31:55 AM
32882	TEST for SOP do not delete	NEW FOUNDATION GRANT REQUEST	Normal	JAMIE HUBBLE	CGI200	11/6/2008 10:33:16 AM

[Search Again](#)

[Export To Excel](#)

[Institutes Home Page : Click Here](#)

- Find the desired ticket to be reopened.
- Click anywhere in the row of the ticket to view the details of the ticket.

Continued on next page.

Reopen A TACCTS ticket (Continued)

Section 2 TACCTS Procedures

To request a status update, click on the Assigned to Section.

Case ID : 32882
Issue Name: TEST for SOP do not delete
Member SSN:
Member Name: JONATHAN TOY
Description: NEW FOUNDATION GRANT REQUEST
Submitted by: JAMIE HUBBLE
Assigned to: Special Projects
Tech Assigned: CGI200
Request Date: 11/6/2008 10:33:16 AM
Status: Closed
Priority: Normal
Date Resolved: 11/13/2008 2:07:26 PM
Resolution: APPLICATION NOT COMPLETE
Previous Attachments: no attachments

Print Issue **Request Reopen**

Comments:	Date:	Comment By:
sdf sdf	11/13/2008 2:07:26 PM	JAMIE HUBBLE
sdf sdf	11/13/2008 2:07:18 PM	JAMIE HUBBLE
edrf	11/6/2008 10:41:55 AM	CGI200
sdfd	11/6/2008 10:33:17 AM	JAMIE HUBBLE
Ticket Creation	11/6/2008 10:33:16 AM	System

- Click on “Request Reopen”

Continued on next page.

Reopen A TACCTS ticket (Continued)

Section 2 TACCTS Procedures

Request Reopen Of Ticket		
Case ID :	32882	
Issue Name:	TEST for SOP do not delete	
Member SSN:		
Member Name:	JONATHAN TOY	
Description:	NEW FOUNDATION GRANT REQUEST	
Submitted By:	JAMIE HUBBLE	
Assigned To:	Special Projects	
Technician Assigned:		
Submit Date :	11/6/2008 10:33:16 AM	
Status:	Closed	
Priority:	Normal	
Attachments:	Attachment 1: <input type="text"/> Browse... Add a file	
Previous Attachments:	no attachments	
Comments:	<div></div>	
Send Request		

Comments:	Date:	Comment By:
sdfsdf	11/13/2008 2:07:26 PM	JAMIE HUBBLE
sdfsdf	11/13/2008 2:07:18 PM	JAMIE HUBBLE
edrf	11/6/2008 10:41:55 AM	CGI200
sdfd	11/6/2008 10:33:17 AM	JAMIE HUBBLE

- Type in the “**Comments**” field the desired information.

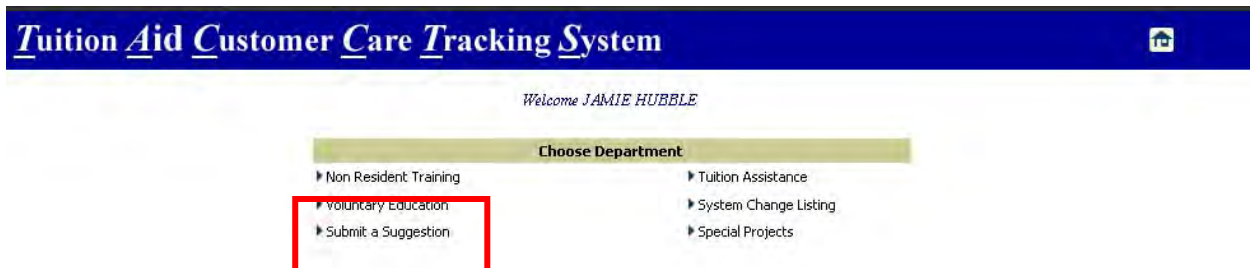
Note 1: The comments history is listed at the bottom of the screen.

Note: If necessary the ESO can modify the “Issue Name”, “Member Identifier”, “Member Name” and “Priority Level” fields.

- Click on “**Send Request**”
- A CGI Technician will receive the ticket and reply to the ESO comments.

Submit a Suggestion

Section 2 TACCTS Procedures



- This option allows ESO's to submit suggestions pertaining to TACCTS.
- Go to TACCTS Home page.
- Click on “**Submit a Suggestion**”.

Continued on next page.

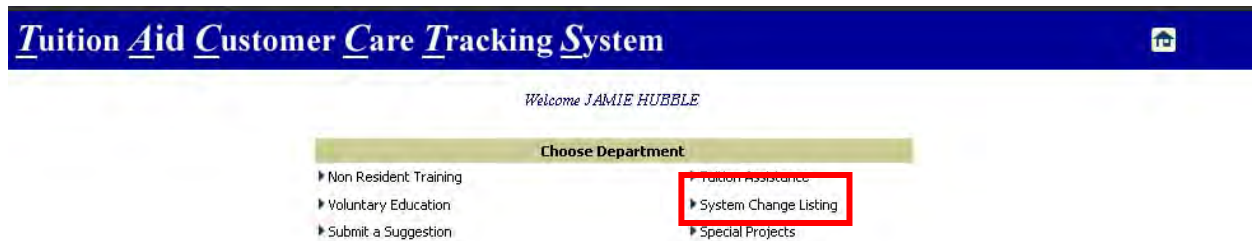
Submit a Suggestion (Continued)

Section 2 TACCTS Procedures

The screenshot shows the 'Build Email' form within the 'Tuition Assistance Customer Care Tracking System'. The form has a blue header bar with the system name and navigation links: 'List Issues', 'Add Issue', and 'Search Issues (ESD)'. Below the header, the form fields are as follows:

- TO:** A text box containing 'CGI-DG-CGI_IT_Dept@uscg.mil'.
- FROM:** A text box containing 'TACCTS_Suggestions@uscg.mil'.
- SUBJECT:** An empty text box.
- MESSAGE BODY:** A large, empty text area.
- Send:** A button located at the bottom center of the form.

- This will open an automatic email to the CGI IT Dept.
- Type the suggestion subject in the “SUBJECT” text block.
- Type the suggestion in the “MESSAGE BODY” text block.
- Click on “**Send**”.
- The suggestion will be sent to the CGI IT Dept. for review.



- This option allows ESO's to view a list of all TACCTS system changes that affect ESO's.
- Go to TACCTS Home page.
- Click on "**System Change Listing**".

Continued on next page.

System Change Listing (Continued)

Section 2 TACCTS Procedures

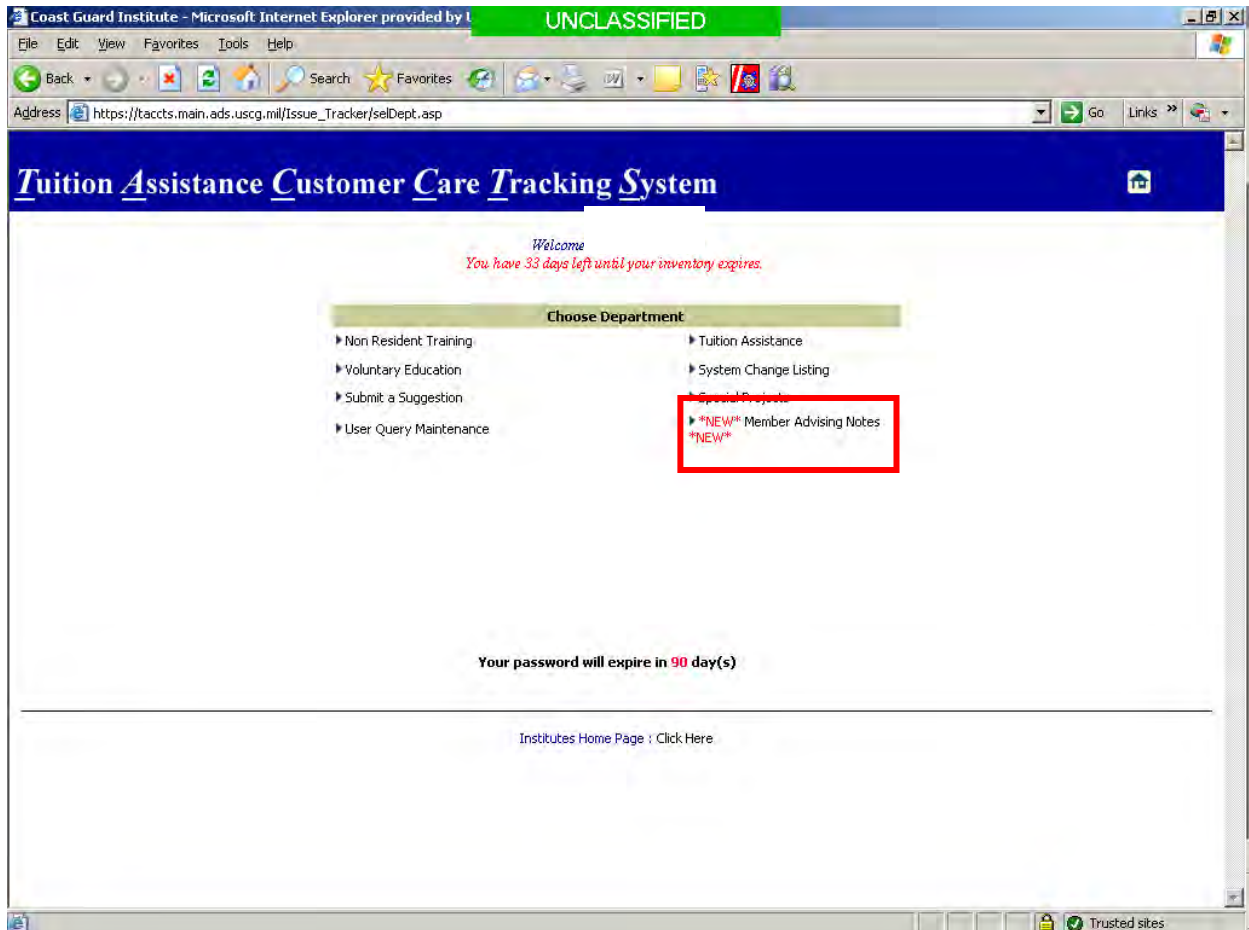
TACCTS System Changes

Department Affected:	Change Description:	Change Date:	SCP Reference #:
ALL	Establish 1 Ticket to ESOs Notify Website Changes	6/10/2008	10007
ALL	Message Size Limit for TACCTS messages. Messages cannot contain more than 1500 characters.	6/23/2008 1:33:35 PM	17230
TA	Grade Submission - Added popup message when ESO selects "Missing Grades" Problem Type.	6/25/2008 7:48:09 AM	15138
NRT	EPQ acknowledgement message will now be displayed and required to be accepted for all rated EOCTs.	6/26/2008 9:44:38 AM	17461
ALL	Built comment history that will be displayed on the modify, resolve, request reopen, and add comment screens. This change affects all departments.	6/26/2008 10:03:25 AM	17489
ALL	Enhanced searching capability. Applies to all departments for both techs and ESO's.	6/27/2008 3:52:15 PM	17530
NRT	Remove 7 day rule for online testing. Once a course is obsoleted, it can no longer be administered online.	7/7/2008 3:08:48 PM	18020
RSS and IT	Completion Letter ACE Statement.	7/15/2008 8:55:01 AM	10472
ALL	Problem types now can be routed to different email groups for more effective management.	7/16/2008 11:17:11 AM	17552
TA	EXTENSION REQUESTS problem type added. Popup message will provide instructions when this problem type is selected.	7/16/2008 3:50:57 PM	10362
NRT	TACCTS user list sorting. Separated city and state for program managers.	7/17/2008 7:38:31 AM	18157
ALL	Inventory Lockout. ESO's who have matching DA dept or matching OFFAC tied to a library inventory will now have their account locked if the inventory verification goes past 40 days.	7/17/2008 8:41:38 AM	18158
TA	ABILITY TO SEND TA AUTH THROUGH TACCTS. CGI now has the ability to send authorizations to both ESO's and members from within TACCTS.	7/21/2008 8:17:52 AM	14865

- **Department Affected** – notify's the ESO what dept. the system change will affect.
- **Change Descriptions** – a description of the system change.
- **Change Date** – the date the system change went into affect.
- **SCP Reference #** - the ticket number for the System Change Proposal.

Member Advising Notes

Section 2 TACCTS Procedures



- The “**Member Advising Notes**” option allows all ESO’s to add and track advising notes on all members at any given time.
- The option is available only on the Home page after signing into TACCTS.
- Click on “**Member Advising Notes**”.

Continued on next page.

Member Advising Notes (Continued)

Section 2 TACCTS Procedures

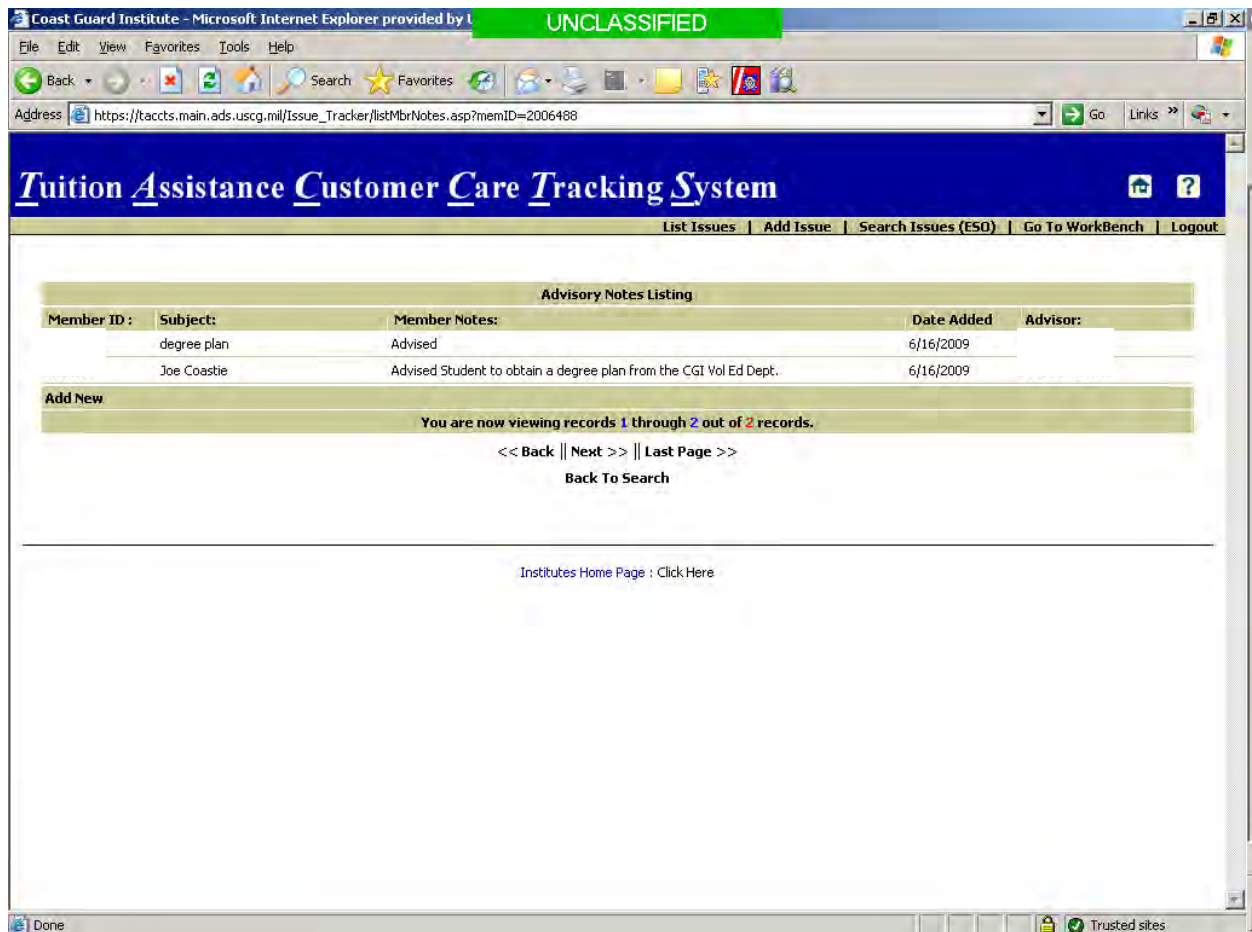
The screenshot shows a Microsoft Internet Explorer browser window. The title bar reads "Coast Guard Institute - Microsoft Internet Explorer provided by t". The address bar shows the URL "https://taccts.main.ads.uscg.mil/Issue_Tracker/addMbrNote.asp". The page has a blue header with the text "Tuition Assistance Customer Care Tracking System" and a green "UNCLASSIFIED" label. Below the header is a navigation bar with links: "List Issues", "Add Issue", "Search Issues (ESO)", "Go To WorkBench", and "Logout". The main content area has a yellow box titled "Search Member Advising Notes" containing a "Member Identifier" label, a text input field, and a "Search" button. At the bottom of the page, there is a link: "Institutes Home Page : Click Here".

- Enter the members “**EMPLID**”.
- Click on “**Search**”.

Continued on next page.

Member Advising Notes (Continued)

Section 2 TACCTS Procedures

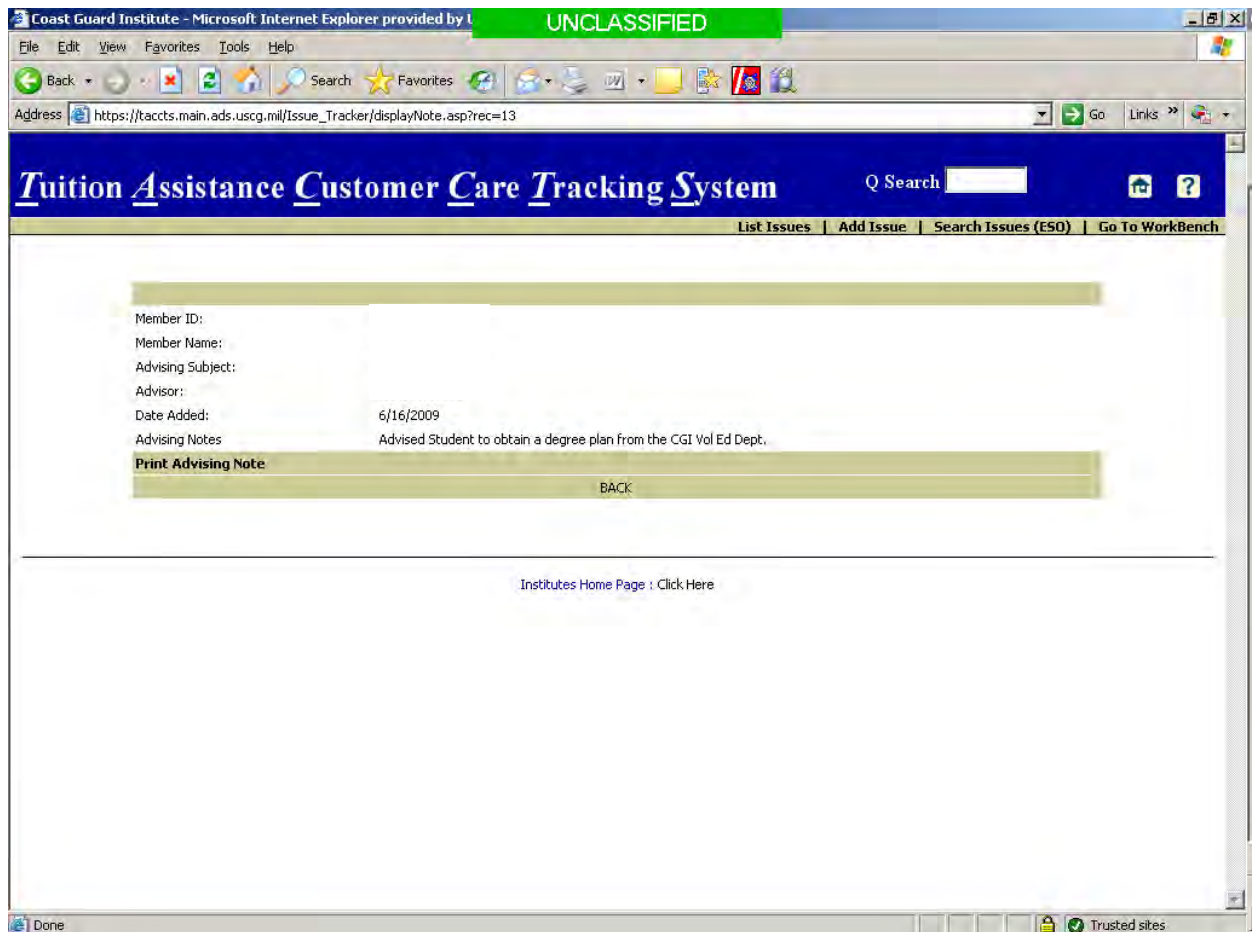


- All advisory notes pertaining to the member will display.
- To review an existing note on a member, click anywhere in the row of the note to view the details of the note.

Continued on next page.

Member Advising Notes (Continued)

Section 2 TACCTS Procedures

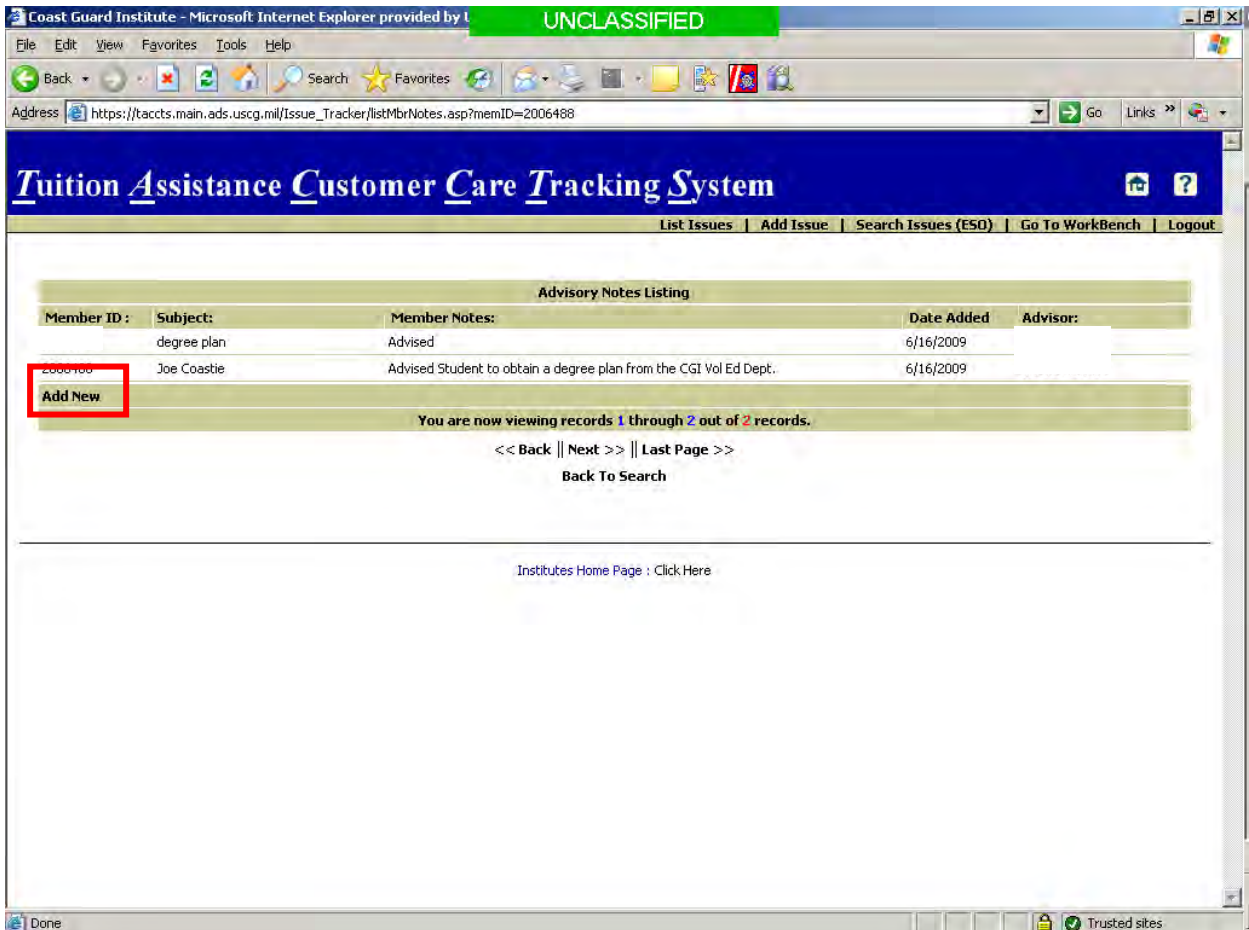


- To print the note, click on “**Print Advising Note**”.

Continued on next page.

Member Advising Notes (Continued)

Section 2 TACCTS Procedures



- To add a new note:
 - Click on “Add New”.

Continued on next page.

Member Advising Notes (Continued)

Section 2 TACCTS Procedures

The screenshot shows a web browser window titled "Coast Guard Institute - Microsoft Internet Explorer provided by t". The address bar shows the URL: https://taccts.main.ads.uscg.mil/Issue_Tracker/createMbrNote.asp?memID=2006488. The page has a blue header with the text "Tuition Assistance Customer Care Tracking System" and a green "UNCLASSIFIED" label. Below the header is a navigation bar with links: "List Issues", "Add Issue", "Search Issues (ESO)", "Go To WorkBench", and "Logout". The main content area is titled "Create Counseling Notes" and contains the following fields:

- Member:
- Advisor:
- Subject:
- Advising Date:
- Notes:

Advised Student to obtain a degree plan from the CGI Vol Ed Dept.

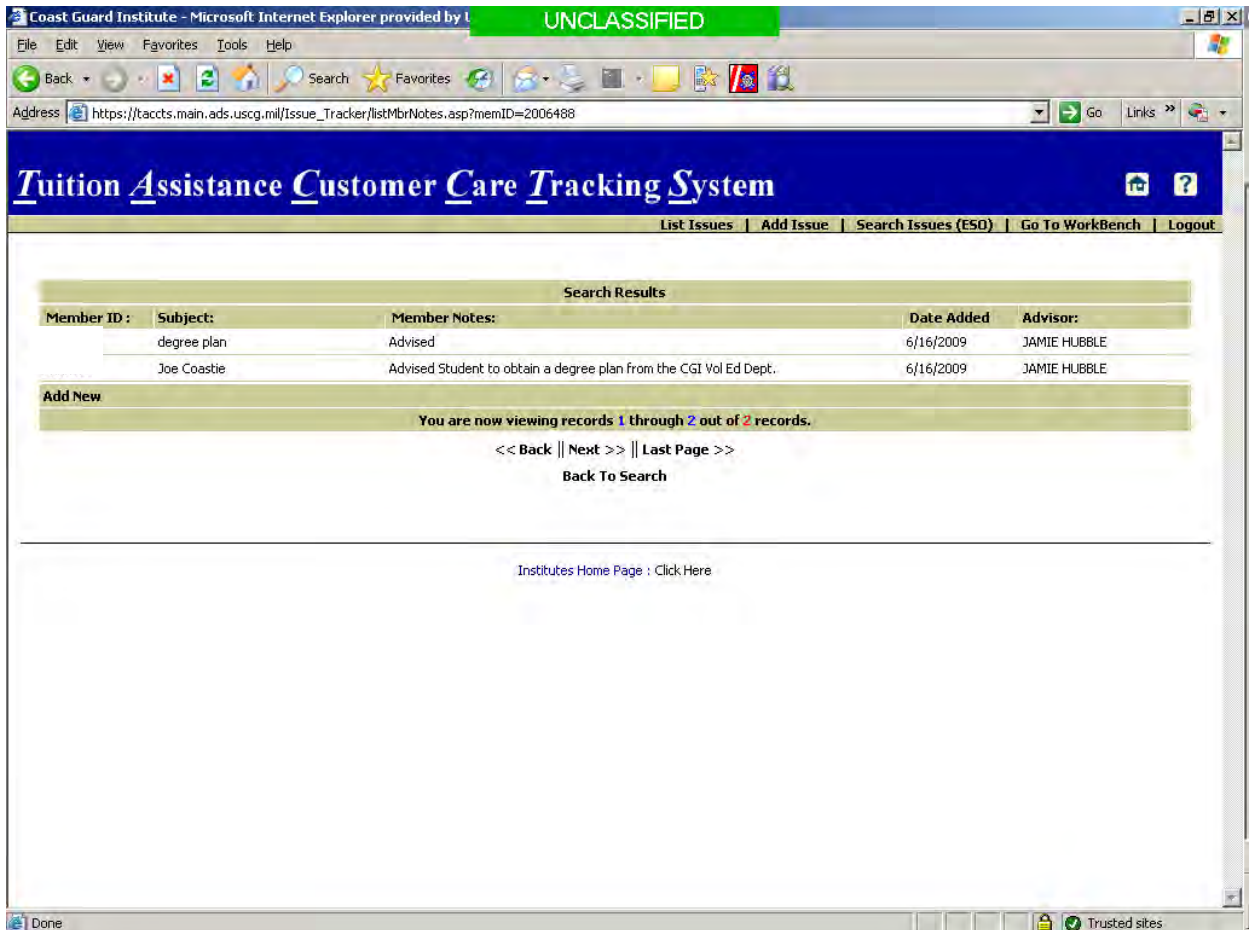
At the bottom of the form is an "Add" button.

- The “**Member**” field will automatically default to the members “**EMPLID**”.
- The “**Advisor**” field will automatically default to the “**ESO’s**” name.
- Type the “**Subject**” of the note in the “**Subject**” field.
- Click on the “**date**” in the “**Advising Date**” field.
- Type the **details of the advice given to the member** in the “**Notes**” field.
- Click on “**Add**”.

Continued on next page.

Member Advising Notes (Continued)

Section 2 TACCTS Procedures



- The note will now be listed on the “**Advisory Notes Listing**” for that member.
- All ESO’s can access all advisory notes for all members. (unless no notes exist)

APPENDIX A

ESO DESIGNATION LETTER & PROCEDURES

ESO Designation Letter & Procedures

Section 2 TACCTS Procedures

Procedure Instructions

At the time of designation as a primary or alternate ESO for your unit, a copy of the designation memo needs to be sent to the NRT department of the CG Institute. This action is necessary in order to properly manage the TACCTS accounts. If an ESO transfers PCS, or separates, the CGI will not know that a new member has assumed these responsibilities unless such notification is received.

An example of an ESO Designation letter is on the following page, which can also be used as a template if desired.



Commanding (unit address)
Officer Staff Symbol:

Phone:

FAX:

Email:

1500

02 January 2009

MEMORANDUM

From: Current ESO Name, Rank, Emplid
Unit Name

Reply to (optional)
Attn of:

To: CO/OINC Unit Name

Thru: (1) Prospective ESOs unit name, rank, Emplid

(2) Prospective ESOs unit name if applicable or omit Thru line

Subj: DESIGNATION AS EDUCATION SERVICES OFFICER (ESO)

Ref: (a) CG Institute ESO Procedures Guides Vols I, CGINST P1550.0

1. You are hereby designated as the (enter unit's name) (enter primary or alternate) Education Services Officer (ESO). You will familiarize yourself with your responsibilities as outlined in reference (a).
2. You are authorized to complete the ESO certification section, block 11, of the Application for Coast Guard Tuition Assistance, CG Form 4147. You are also authorized to complete the Application for Tuition Assistance Waiver, CG Form 4147-1, except for block 10e. The command endorsement signature block must be completed by the CO/OIC or appropriate delegated authority, other than the ESO
3. You are hereby designated as authorized to sign the command endorsement block of the Coast Guard Foundation Education Grant Program (CGFEGP) application, CGI Form 1560/10a. (This paragraph is optional; only use this paragraph if the CO/OinC wishes to delegate this authority to the ESO. This authority is not automatically assumed as an ESO).
4. As ESO, you will responsible for using the TACCTS to send inquiries and requests to the CG Institute on behalf of the command. This customer service tool is to be used for tuition assistance, non-resident training (tests) and resource support section (courses) issues.

#

FIRST ENDORSEMENT (space after)

From: ESO's name
Unit name

To: CO/OinC name
Unit name

1. I hereby acknowledge the above designation.

Copy: Admin

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APPENDIX B

ESO RELIEF LETTER & PROCEDURES

ESO Relief Letter & Procedures

Section 2 TACCTS Procedures

Procedure Instructions

At the time of relief as a primary or alternate ESO for your unit, a copy of the relief memo needs to be sent to the NRT department of the CG Institute. This action is necessary in order to properly manage the TACCTS accounts. If an ESO transfers PCS, or separates, the CGI will not know that his/her TACCTS account needs to be disabled unless we receive such notification. Sending a copy of the relief memo will also help the CG Institute prevent unwanted ESO related emails from being sent to you. An example of an ESO Relief letter is on the following page, which can also be used as a template if desired.

U.S. Department of
Homeland Security

United States
Coast Guard



Commanding Officer (unit address)
Staff Symbol:
Phone:
FAX:
Email:

1500
12 April 2011

MEMORANDUM

From: CO/OinC
Unit Name

Reply to
Attn of:

To: Prospective ESOs name, rank, Emplid
Thru: Prospective ESOs unit name if applicable or omit Thru line

Subj: EDUCATION SERVICES OFFICER RELIEF/AUDIT

Ref: (a) Education Services Officer Procedures VOL. I, CGINST P1550.1

1. IAW reference (a) and effective the date of this memorandum, I have been relieved by (new ESO name, rank and Emplid) of the duties and responsibilities of (primary or alternate) ESO for (name of unit).

2. An audit of all End Of Course Tests has been completed. All tests have been accounted for. All relevant documents, logs, files have been turned over and are in a secure safe.

#

Copy: Unit Files
CG Institute (NRT)